

# Panasonic

## Operating Manual—Client Phone Assistant Series

**Model No.** KX-NCS1101/KX-NCS1105/KX-NCS1110  
KX-NCS1199/KX-NCS1201/KX-NCS9101



Thank you for purchasing this Panasonic product.  
Please read this manual carefully before using this software and save this manual for future use.

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# **Introduction**

The Phone Assistant (PA) application is an intuitive Computer Telephony Integration (CTI) software solution to enhance the productivity of Panasonic Private Branch Exchange (PBX) telephone users.

PA software consists of the following software components:

1. PA—used by phone users
2. PA Status—for supervisors or managers
3. PA Manager—performs configuration or setup for all PA users
4. PA Server—the core engine for all PA software

## **Condition**

- The screen shots may be different from the actual software.

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## Section 1

### *Starting Phone Assistant*

## 1.1 Starting Phone Assistant for the First Time

To start the application:

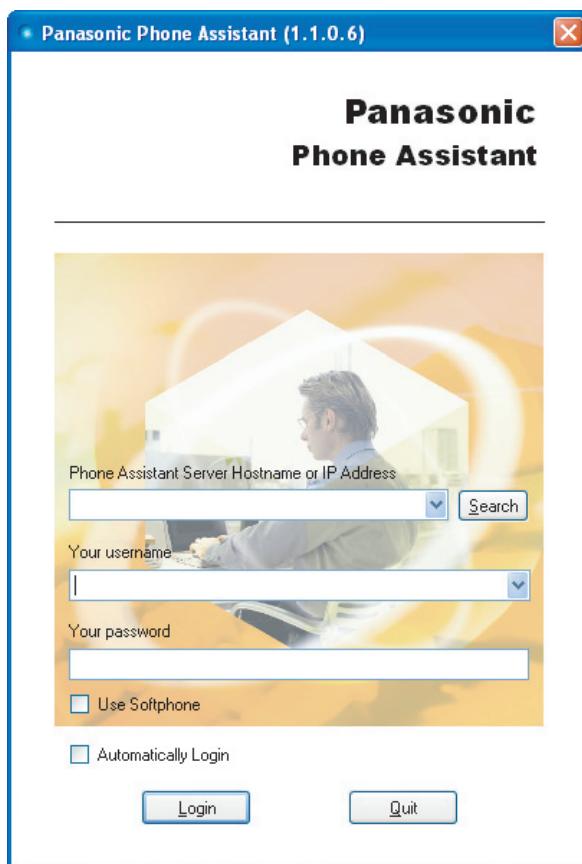
1. Double-click the shortcut on your desktop, or start the Phone Assistant from the Start menu:  
**Start → All Programs → Panasonic → Phone Assistant → Phone Assistant**



2. Enter the server host name or the IP address.

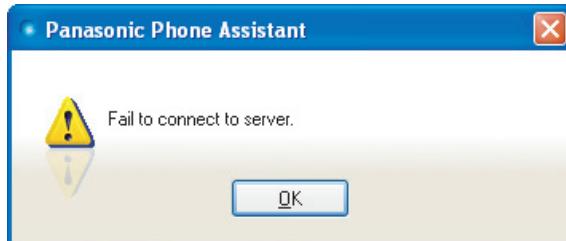
—or—

Click **Search** for all the PA Server available on the network.



**Note**

- When the software cannot connect to the PA Server, the following error message will appear.



This error screen also appears when the **Phone Assistant Server Hostname or IP Address** field is either empty or incorrect.

**What to do:**

Click **OK** to continue, check your server IP address and attempt to connect to the server again. In some cases, it is recommended to use the **Search** button to refresh the PA Server list.

- Enter your user name in the **Your username** field.
- Enter your password in the **Your password** field.

**Note**

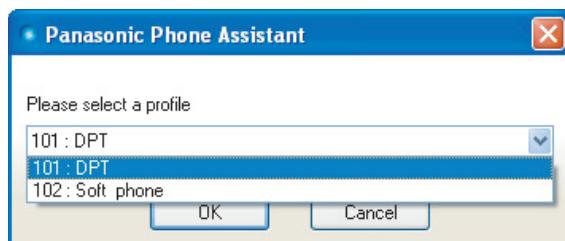
- When the **Automatically Login** option is checked, you can log in to PA without manually entering your user name and password every time.



- Click **Login**.

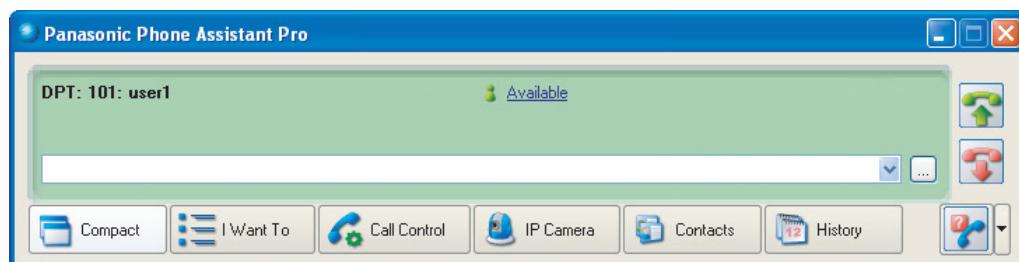
**Note**

If 2 or more extensions are set in your profile on PA Manager, the profile selection dialog box will appear.



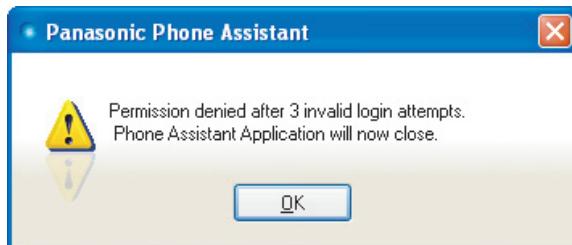
Select a profile from the drop-down list and click **OK**.

After you have successfully logged in to the application, the Information Panel will appear in **Compact** mode.



### Note

- If you cannot successfully log in after 3 attempts, the following error message will appear.



### What to do:

Click **OK**, and PA will exit. Launch PA and try logging in again.

To exit the application:

1. Click the close button.



A dialog box asking you to confirm the operation will appear.

2. Click **Yes**.

## 1.2 Logging In after the First Time

To log in to the application:

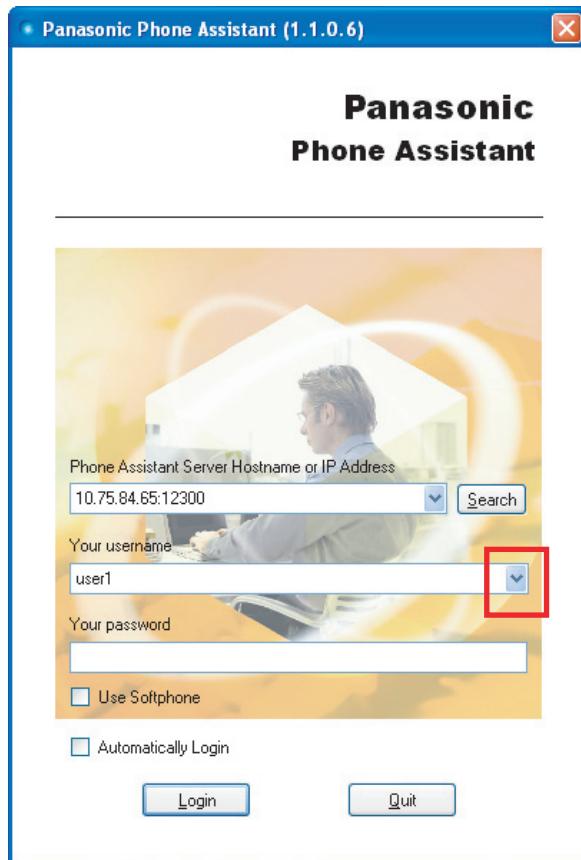
1. Double-click the shortcut on your desktop, or start the Phone Assistant from the Start menu:  
**Start → All Programs → Panasonic → Phone Assistant → Phone Assistant**

### Note

The folder names may be different from the path listed above if a different path was entered during the installation process. The above path is the default path.



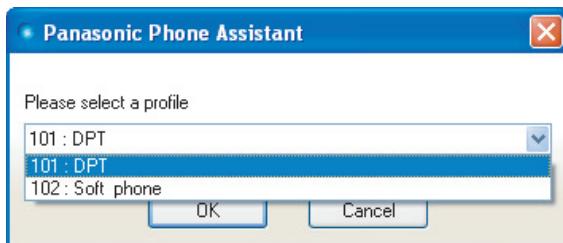
2. Select your user name from the drop-down list by clicking the arrow.



3. Enter your password in the **Your password** field.
4. Click **Login**.

**Note**

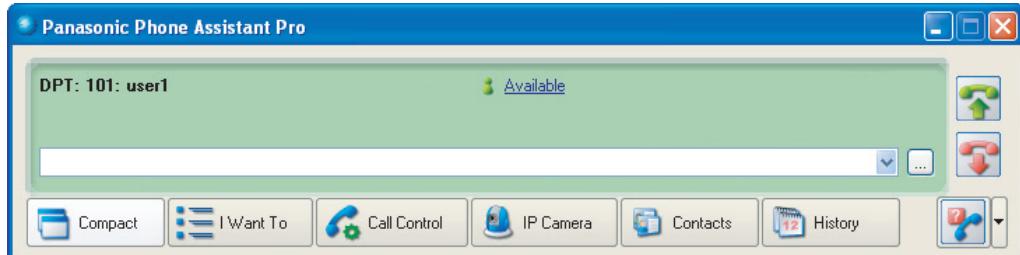
If 2 or more extensions are set in your profile on PA Manager, the profile selection dialog box will appear.



Select a profile from the drop-down list and click **OK**.

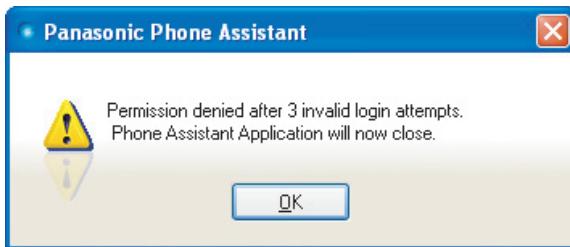
## 1.2 Logging In after the First Time

After you have successfully logged in to the application, the PA Information Panel will appear in **Compact** mode.



### Note

- If you cannot successfully log in after 3 attempts, the following error message will appear.

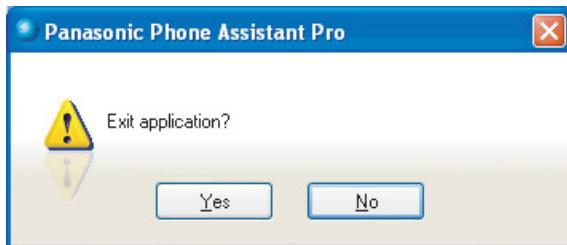


### What to do:

Click **OK**, and PA will exit. Launch PA and try logging in again.

To exit the application:

1. Click the close button.



A dialog box asking you to confirm the operation will appear.

2. Click **Yes**.

A warning message will appear if you do not have a valid license for Pro mode. You may log in to Pro Trial mode or Express mode instead if you meet the following conditions.

### You can log in to Pro Trial mode if:

- you do not have a Pro license.
- the number of users does not exceed the user capacity for Pro Trial mode.
- the 60 day trial period has not expired.

If you agree to the conditions stated above, select the check box and click **Yes** to use the application in Pro Trial mode.

### You can log in to Express mode if:

- You do not meet the conditions to log in to Pro Trial mode.
- The number of users does not exceed the user capacity for Express mode.

If you agree to the conditions stated above, select the check box and click **Yes** to use the application in Express mode.

When the number of PA users exceeds the user capacity for each mode, the following message will appear.





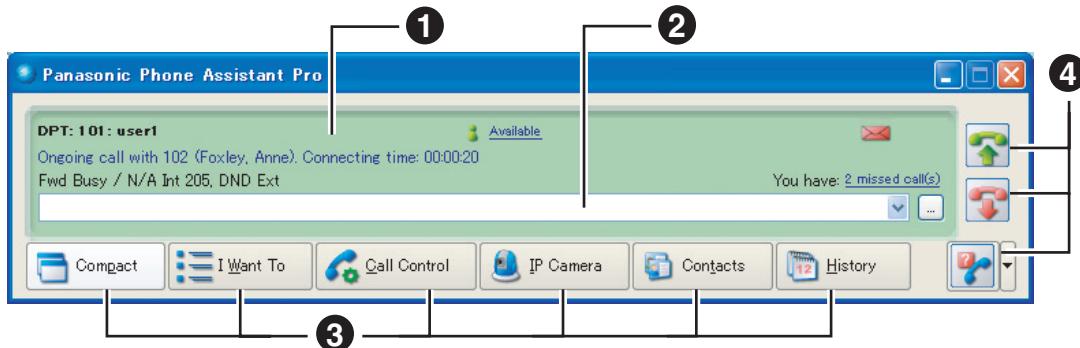
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## **Section 2**

### ***Interface Overview***

## 2.1 User Information Panel

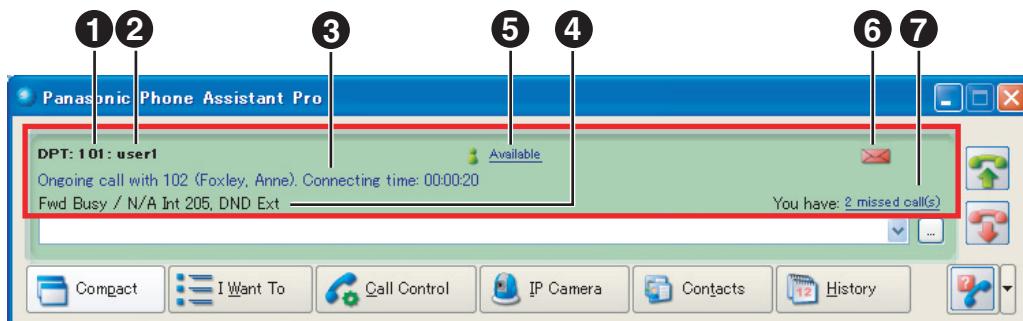
The User Information Panel is the central point of the application where all of the most important information can be monitored at any time. All of the important functions can be started here.



The User Information Panel is composed of the following:

- ① User Information Field
- ② Information Panel Input Field
- ③ Function Tabs
- ④ Control Buttons

### User Information Field



The following information related to the PA user is displayed in this field:

- ① Phone/Extension Number
- ② User name
- ③ The user's current call activity

Shows information about any new/ongoing active communication processes.

Depending on the current operation, the following information may be shown:

- Incoming call  
If there is an incoming call, information about the call is shown, and you can select what action to take (e.g., answer the call). The **Call Alert** screen appears when there is an incoming call, by default. Please refer to 3.2.2.2 Answering Calls for details.
- Outgoing call  
If you are making a call, information of this call is shown.
- Ongoing (Current/Active) call  
If there is an ongoing call, information on the current status of that call is shown.

- ④ Phone Presence

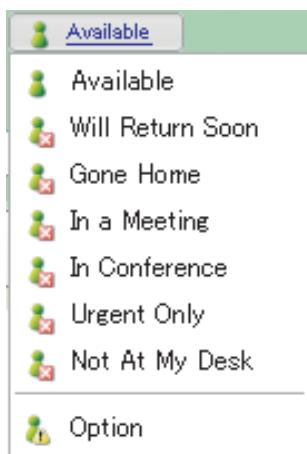
Displays the current status of the Panasonic telephone to other PA users.

You can set Forwards/DND setting under the **I Want To** tab or using the Function Preset List button. Please refer to 3.1 I Want To Tab or 4.3 Function Preset List Button for details.

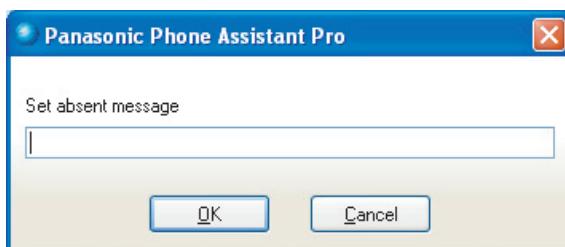
### 5 Absent Message

Displays a message (e.g., the reason for absence) seen by other PA users.

You can set your message by clicking the icon. When no Absent Message is set, **Available** is displayed.



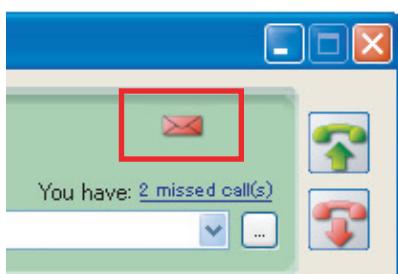
When Option is selected, the Absent Message window will appear. You can assign a custom Absent Message of up to 16 characters.



You can also assign a custom Absent Message using the Function Preset List button. Please refer to 4.3.1 Customizing Functions for details.

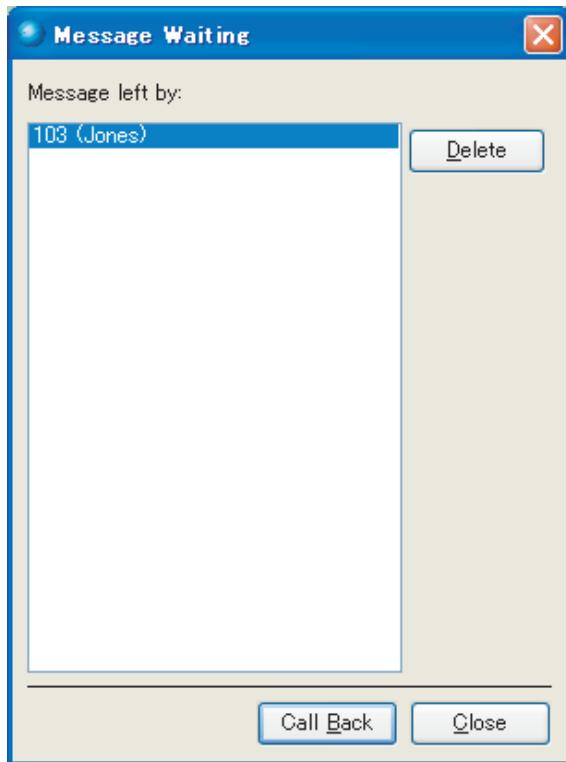
### 6 Message Waiting Indication

When a message is left on your extension, the message waiting icon is displayed in the User Information field.



## 2.1 User Information Panel

Clicking the message waiting icon displays the extension number and the name of the user who left the message.



- Click **Call Back** to call that extension.
- Click **Delete** to remove the message information.

### ⑦ Missed Calls Notification

The following notification appears when you miss any calls:

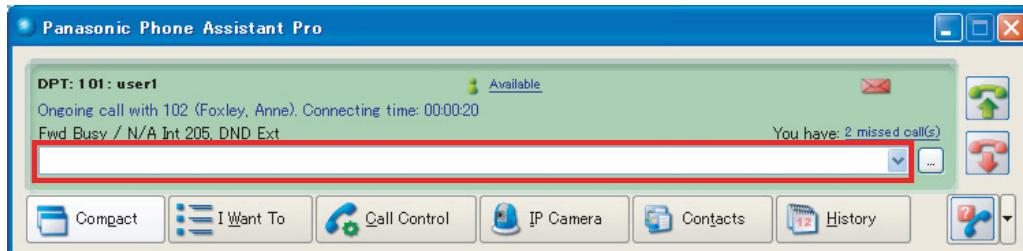
- (The number of) Missed calls

When an incoming call does not get answered, this call is marked as a missed call and the Missed Calls Notification will be shown in the User Information field. When you click the Missed Calls Notification field, the missed calls overview appears in the **History** tab, and the Missed Calls Notification disappears from the User Information field.

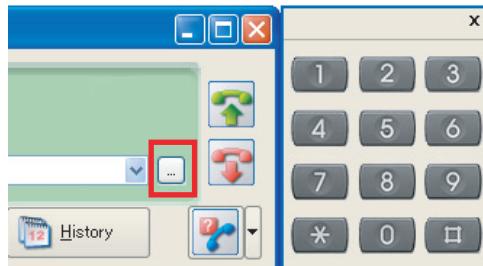
When the Show Incoming Missed Calls button in the **History** tab is also clicked, the Missed Calls Notification disappears. Please refer to 3.5 History Tab for details.

## Information Panel Input Field

Calls can be made by entering telephone numbers in the input field shown below.



- It is a general input box which records data from users. Pressing ENTER when the input field contains data, records that data.
- When you click the button (...) next to the input field, a numeric keypad will appear, which you can use to enter the number.

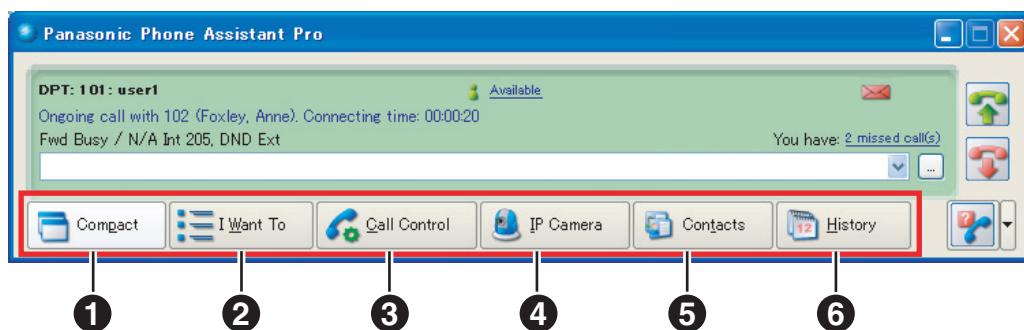


- The last 10 outgoing calls (internal/external) are stored, including new calls and transferred calls.
- The input field is updated/refreshed consistently (showing the presently called extension number) when you make a new call.
- You can choose from the list of previously entered numbers. When a number is chosen from the list, the contents of the input field will change to that number. You can still make changes to this number.

A maximum of 32 characters can be entered in this field.

## Function Tabs

There are 6 function tabs for you to select:



### ① Compact

Closes any tabs that are currently open.

### ② I Want To

Provides shortcuts for certain functions. Please refer to 3.1 I Want To Tab for details.

### ③ Call Control

All the call activities are managed through here. Please refer to 3.2 Call Control Tab for details.

### ④ IP Camera

Specifies the availability of an IP Camera. Please refer to 3.3 IP Camera Tab for details.

### ⑤ Contacts

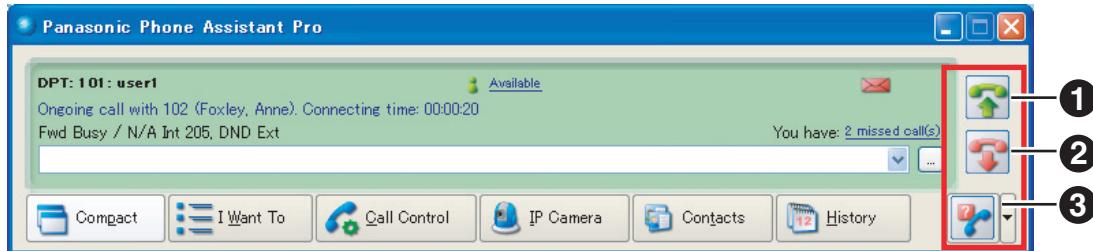
You can manage your contact list within this function tab. Please refer to 3.4 Contacts Tab for details.

### ⑥ History

You may view both incoming and outgoing Call Logs. You may also make a call from the Call Log. Please refer to 3.5 History Tab for details.

### Control Buttons

There are 3 buttons that help you to manage your call activity:



**① Answer or Dial button**

Please refer to 4.1 Answer or Dial Button for details.

**② Hang Up button**

Please refer to 4.2 Hang Up Button for details.

**③ Function Preset List button**

Allows you to operate frequently-used functions with a single-click. Please refer to 4.3 Function Preset List Button for details.

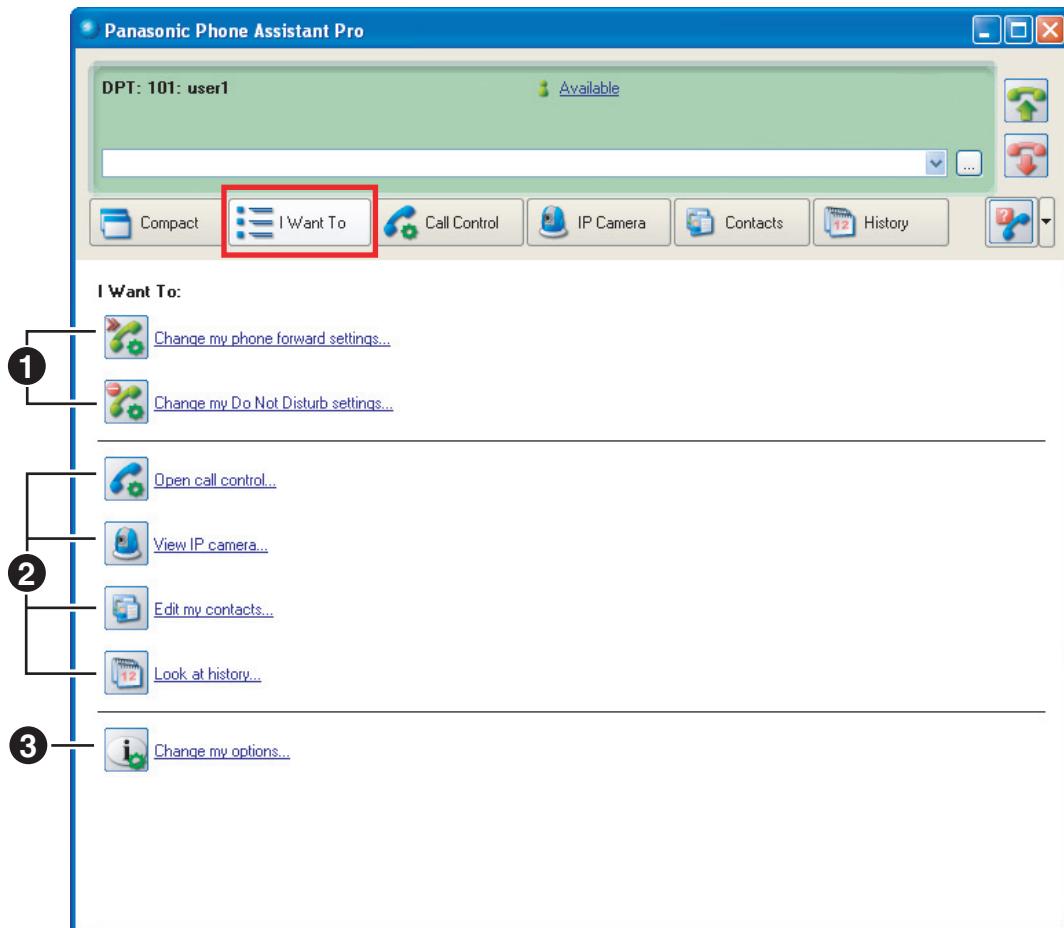
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## ***Section 3***

### ***Operation with Tabs***

## 3.1 I Want To Tab

The **I Want To** tab gives you easy access to the most commonly used functions. The screen below is shown when you click this function tab.



- ① These 2 options allow you to set the Forward or DND settings. When you select these options, sub options will be displayed. You can go back to the previous screen by selecting **Back** or to the default screen of the **I Want To** tab by selecting **Home**.
- ② The 4 middle options (shortcuts) are actually links to other function tabs in this application. Selecting these options will activate the corresponding function tab.
- ③ Selecting **Change my options...** opens the **Profile Option** screen. Please refer to 5.1 Profile Options for details.

### 3.1.1 Changing Forwarding Settings

Clicking **Change my phone forward settings...** forwards your calls to another user/extension.



1. To change the call forwarding setting, click the desired type of calls.



[All calls...](#)



[External calls...](#)



[Internal calls...](#)



[None \(Clear my Forwards/DND\)](#)

- **All calls...**  
All incoming calls will be forwarded to the specified number.
- **External calls...**  
All external calls will be forwarded to the specified number.
- **Internal calls...**  
All internal calls will be forwarded to the specified number.
- **None (Clear my Forwards/DND)**  
All call forwarding settings and DND settings are cleared.  
The control returns to the main screen of the **I Want To** tab.

2. Click one of the options below to decide when calls should be forwarded.



[Always...](#)



[On busy...](#)



[On no answer...](#)

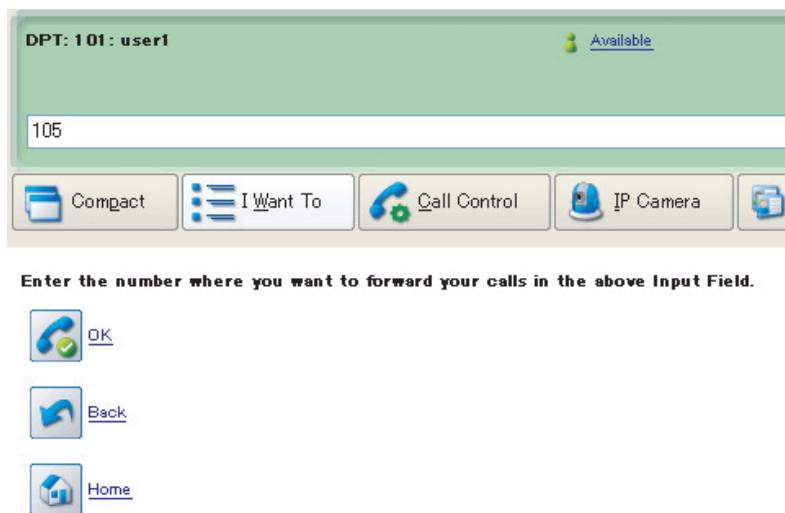


[On busy/no answer...](#)

- **Always...**  
The incoming call is forwarded regardless of the Phone Presence.
- **On busy...**  
The incoming call is forwarded only when your extension is busy on another ongoing call.
- **On no answer...**  
The call is forwarded only when your extension does not answer the incoming call.
- **On busy/no answer...**  
The call is forwarded when both your extension is busy on another ongoing call or when the call is not answered.

### 3.1.2 Changing Do Not Disturb Settings

3. Enter the extension number into the Information Panel input field.



After the number is entered in the Information Panel input field, click **OK**, then the call forward setting to the specified number will be set, and the control returns to the main screen of the **I Want To** tab. When making the setting, you may abort the setting and return to the previous page by clicking the options **Back** or **Home**.

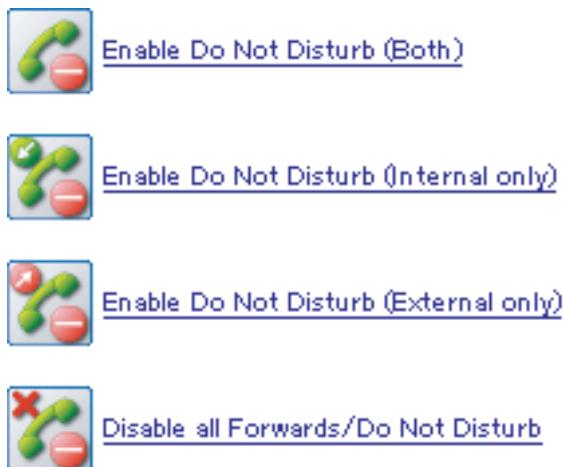
### 3.1.2 Changing Do Not Disturb Settings

This refers to your Do Not Disturb (DND) settings on the PBX.

1. Click **Change my Do Not Disturb settings....**

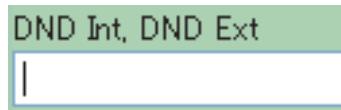


2. The following options appear. Click the desired type of DND setting:

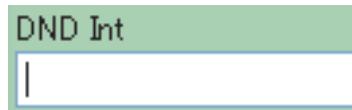


3. The following texts corresponding with the type of DND setting displayed in the Information Panel input field.

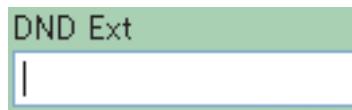
- When the **Enable Do Not Disturb (Both)** option is clicked, the Phone Presence is set to **DND Int, DND Ext**:



- When the **Enable Do Not Disturb (Internal only)** option is clicked, the Phone Presence is set to **DND Int**:



- When the **Enable Do Not Disturb (External only)** option is clicked, the Phone Presence is set to **DND Ext**:



- When the **Clear All Forwards/Do Not Disturb** option is clicked, all of the call forward settings and DND settings of the telephone are cleared.

#### **Note**

- By enabling the DND setting, you cannot receive internal and/or external incoming calls.
- It is possible to set FWD Int and DND Ext, or FWD Ext and DND Int at the same time.

## 3.1.3 Shortcuts

The **I Want To** tab provides a set of shortcuts which may be used to perform frequently used functions or to configure profile options.



[Open call control...](#)



[View IP camera...](#)



[Edit my contacts...](#)



[Look at history...](#)

---

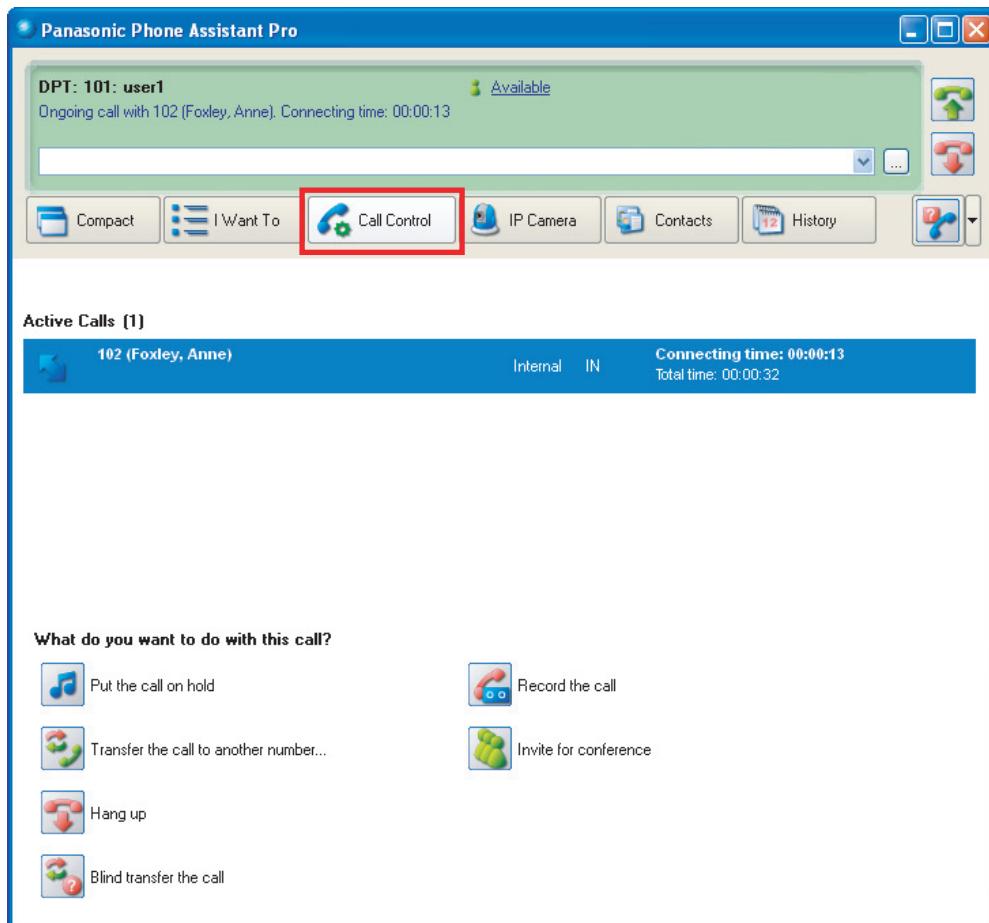


[Change my options...](#)

- **Open call control...**  
This is a shortcut to the **Call Control** tab. Please refer to 3.2 Call Control Tab for details.
- **View IP camera...**  
This is a shortcut to the **IP Camera** tab. Please refer to 3.3 IP Camera Tab for details.
- **Edit my contacts...**  
This is a shortcut to the **Contacts** tab. Please refer to 3.4 Contacts Tab for details.
- **Look at history...**  
This is a shortcut to the **History** tab. Please refer to 3.5 History Tab for details.
- **Change my options...**  
This is a shortcut to **Profile Option**. Please refer to 5.1 Profile Options for details.

## 3.2 Call Control Tab

This screen shows and handles the basic call functions available in a PBX.



### 3.2.1 Active Call Information

## 3.2.1 Active Call Information

The **Active Calls** information will be shown under the **Call Control** tab.



For each active call, the following information is displayed in the **Active Calls** field:

- Information of the call (extension number and name)
- Type of call (internal or external)
- Direction of the call (incoming or outgoing)
  - When you are making a call, the extension number and name of the call destination are displayed.



- When you receive a call, the extension number and name of the caller are displayed.



- When the call was forwarded by other extension or blind transferred, Forwarded from xxx will be displayed. The number and name of the original caller are also shown.



- When the call falls back after being on transfer or hold, Recalled from xxx will be displayed. The number and name of the original caller are also shown.



- Call Status Icons

The following icons appear in the **Active Calls** field. Each icon describes the status of the active call.

Icon	Call Status
	Incoming

Icon	Call Status
	Dialtone
	Ringback
	Busy
	Connected
	On Hold
	Conferenced
	On hold pending transfer
	On hold pending conference
	Disconnected
	Unknown

- Duration of the call
  - Dialing time**—From when you pick up the receiver to when the number is dialed completely.



### 3.2.2 Active Call Handling

- **Ringing time**—From when the number is dialed to when the call is connected.



- **Connecting time**—From when the call is connected to when it ends.



- **Total time**—The total of the Ringing time and Connecting time.



## 3.2.2 Active Call Handling

This topic specifies all of the call handling functions supported by PA.

There are 6 types of Active Call Handling functions available:

1. Make Calls
2. Answer Calls
3. Terminate Calls
4. Transfer Calls
5. Hold Calls or Retrieve Held Calls
6. Reject Calls

You can handle current calls by clicking the desired options (icons) available under **What do you want to do with this call?** in the **Active Calls** field. When there are no calls at your extension, no options (icons) are available.



**What do you want to do with this call?**



The following options are available depending on the type of call.

Icon	Description
	Answer the call
	Reject the call...
	Put the call on hold
	Transfer the call to another number...
	Hang up
	Blind transfer the call
	Record the call
	Invite for conference
	Retrieve the call
	Redial this number...

### 3.2.2.1 Making Calls

#### Dialing/Redialing can be Performed to:

- Another extension.
- An operator (depends on country/area).
- An outside party (automatic line access only).
- A private network (automatically)—(linked PBXs).

#### Dialing can be Performed by:

- Typing the number into the Information Panel input field.

### 3.2.2 Active Call Handling

- Hotkey dialing (Keyboard shortcut using clipboard [e.g., CTRL+A]). Using the clipboard (Plain/Text) from any application (copy/paste from application/WEB).
- Double-clicking the contact in the **Contacts** tab.
- Right-clicking the contact in the **Contacts** tab and selecting Dial number.

### Redialing can be Performed by:

- Double-clicking the desired number in the **History** tab.
- Right-clicking the call log in the **History** tab and select Dial number.

The following screen appears after clicking **Redial this number...** while the called extension is busy, and also when clicking Redial while the called extension is not responding.



- Number to be redialed
- Time countdown (starts at 30 seconds)
- **Dial Now** button
- **Abort** button

#### Note

The time countdown displays the amount of time remaining before the system redials the destination number automatically. Clicking **Dial Now** will start redialing the destination number instantly. Clicking **Abort** will cancel the redialing process.

### After a Call is Made:

After dialing/redialing the number, one of the following situations can arise:

- A dial tone is heard and the call is answered.
- A dial tone is heard and the call is not answered.
- A busy tone is heard (the called extension is busy).
- A DND tone is heard (the called extension has set DND).
- The call is rejected or the called extension does not exist.
- The call cannot be made due to the extension's settings (e.g., not permitted to make outgoing calls).
- The call cannot be made due to sufficient resources (e.g., all trunks are occupied).

### 3.2.2.2 Answering Calls

When you receive a call, the **Call Alert** screen appears automatically.



#### Note

The alert is both visual and aural. It is possible to turn off both visual and aural alerts if necessary. Please refer to 5.1.5 Sounds and 5.1.6 Visualization for details.

#### Using the Answer Button in the Call Alert Screen, You may:

- Answer a call.
- Answer a call which is put on hold.
- Answer a call waiting (depends on the extension's setting in the PBX).

#### Answering Calls can be Performed by:

- Clicking **Answer the call** in the **Call Control** tab.
- Clicking **Answer** on the **Call Alert** screen.
- Hotkey dialing (Keyboard shortcut using clipboard [e.g., CTRL+A]).

#### When a Call Arrives:

- The call is answered.

### 3.2.2.3 Terminating Calls

When you are on a call, the call may be terminated.

#### Terminating Calls can be Performed by:

- Hotkey dialing (Keyboard shortcut using clipboard [e.g., CTRL+D]). Using the clipboard (Plain/Text) from any application (copy/paste from application/WEB).
- Clicking the Hang Up button on the Information Panel.

#### After a Call is Terminated:

- The call will end.

### 3.2.2.4 Transferring Calls

When you are on a call, calls can be transferred to another extension or outside party.

One of 2 options may be selected when transferring a call:

- **Blind transfer the call** (Unannounced)
- **Transfer the call to another number...** (Announced)

#### Either Transferring Option can be Performed by:

- Entering the number into the Information Panel input field and clicking one of the options.

##### Note

If you click either transferring option without entering a number into the Information Panel input field, the Contact List will be displayed. Double-click the extension number.

#### When either Transferring Option is Clicked:

- When the **Blind transfer the call** option is clicked:
  - The call will be transferred without informing the transfer destination about the call.
  - The transferred call will fall back if it does not get answered.
- When the **Transfer the call to another number...** option is clicked:
  - The call will be transferred after connecting with the transfer destination and informing him/her about the call.
  - The transferred call will fall back if it does not get answered.

### 3.2.2.5 Holding Calls or Retrieving Held Calls

Ongoing calls can be put on hold to be retrieved later.

#### Holding/Retrieving Held Calls can be Performed as Follows:

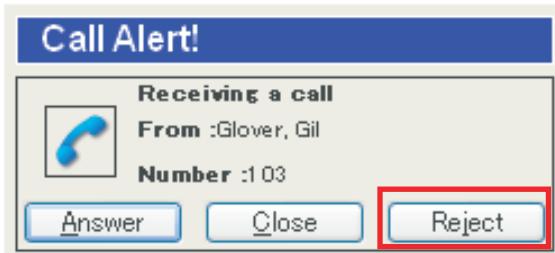
- Highlighting the call in the **Call Control** tab and clicking **Put the call on hold/Retrieve the call**.

#### After a Call is Held or Retrieved:

- Hold: puts the selected call on hold.
- Retrieve: retrieves the held call.

### 3.2.2.6 Rejecting Calls

You may reject an incoming call.

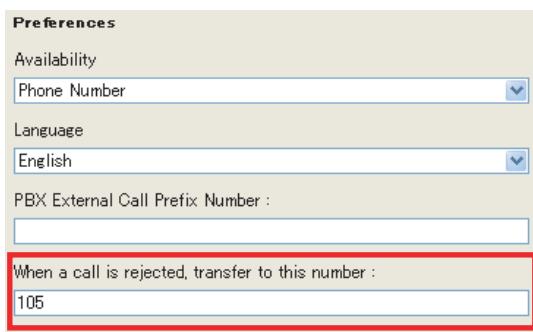


#### Rejecting Calls can be Performed by:

- Clicking **Reject** on the **Call Alert** screen.
- Clicking **Reject the call...** shown in the **Active Calls** field under the **Call Control** tab.

#### Note

You must specify the extension number or the mailbox number of the Voice Processing System to which rejected calls are transferred. Go back to the **I Want To** tab and click **Change my options....** Please refer to 5.1.7 Preferences for details.



#### After a Call is Rejected:

- The incoming call is transferred to the specified extension or Voice Processing System mailbox.

#### Note

When **Close** is clicked, the **Call Alert** screen disappears.

### 3.2.3 Conference Call

During a conversation, you can add additional parties to the conversation.

When you initiate a conference call, the following functions are displayed in your **Active Calls** screen.

Icon	Description
	Invite for conference

### 3.2.3 Conference Call

Icon	Description
	Establish conference
	Remove participant from the conference
	End the conference

#### **Note**

These functions are only available in the conference initiator's **Active Calls** screen.

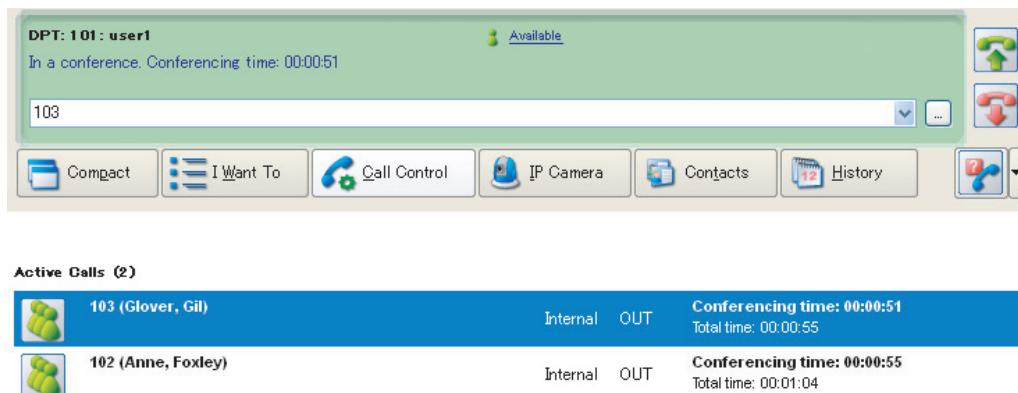
## To Establish a Conference Call

1. Enter the desired extension number in the Information Panel input field.
2. Click **Invite for conference**.

#### **Note**

When the input field is empty and this option is selected, the Contact List is displayed. Double-click the extension number.

3. After the invited party answers the call, click **Establish conference**.
4. The following information about the conference participants will be displayed in the initiator's **Active Calls** screen.
  - Extension number or outside party number
  - Name
  - Call information (Type of call, Direction of call and Duration time)



In the **Active Calls** screen of the other conference participants, only the initiator's information will be displayed.

## To Disconnect One Party from the Conference

1. Select the extension to be disconnected in the **Active Calls** screen.
2. Click **Remove participant from the conference**.

## To Leave a Conference

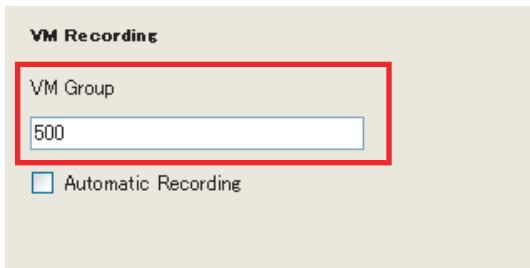
You can leave the conference and allow the other parties to continue the conversation by clicking **Hang Up**.

## To Close a Conference

To close the conference, click **End the conference**.

## 3.2.4 Recording a Conversation

To record a conversation, a Panasonic Voice Processing System (VPS) needs to be connected to your PBX. Before using this function, assign a VPS mailbox number in the VM Recording screen. Please refer to 5.1.9 VM Recording for details.



You may record a conversation either manually or automatically.

### Manual Recording

During a conversation, click **Record the call**. You can record a conversation into your mailbox. The following icon flashes while a conversation is being recorded.



The recording will stop when the call is terminated. If you wish to stop recording during a conversation, click **Stop recording**.



### 3.3.1 Setting IP Camera

## Automatic Recording

When **Automatic Recording** in the VM Recording is enabled, recording starts automatically when a call is started.



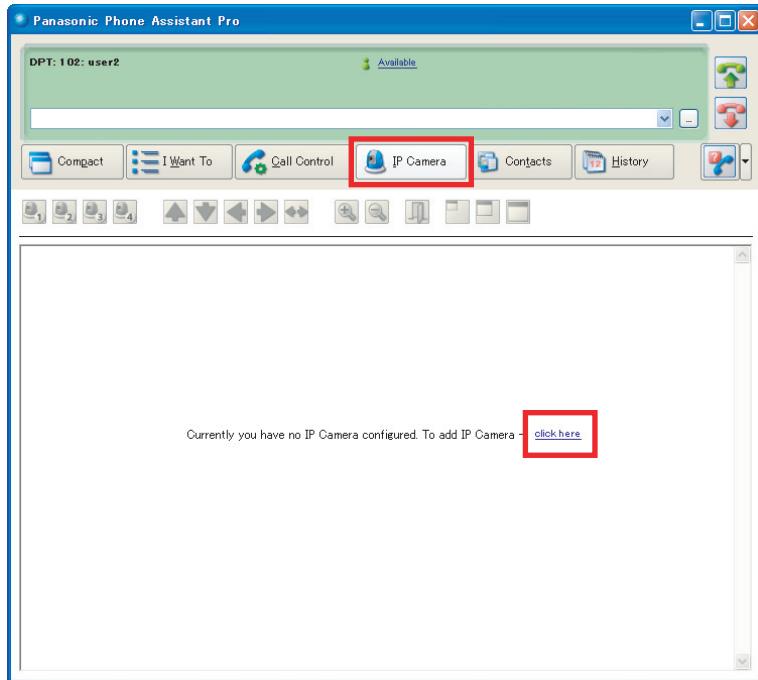
## 3.3 IP Camera Tab

### 3.3.1 Setting IP Camera

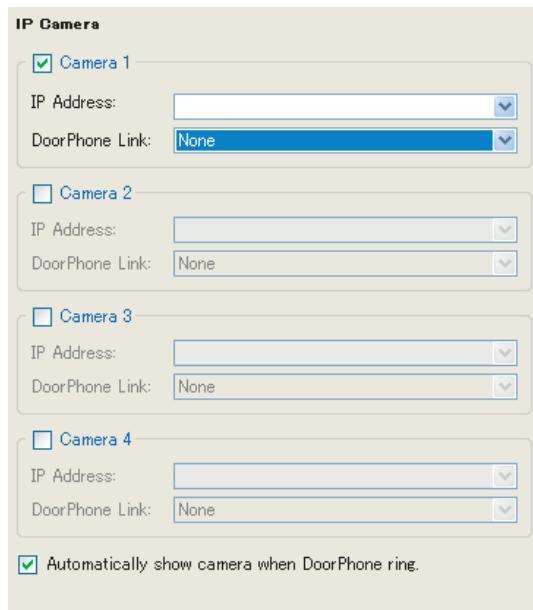
The **IP Camera** tab enables the integration of Panasonic KX-HCM/KX-BL-C series IP cameras. Using this feature, you can view live streaming video from up to 4 IP cameras connected to the network. It is also possible to control the IP cameras.

After clicking the **IP Camera** tab, follow the instructions below to start viewing video from an IP camera.

1. Click the link **click here**.



2. Assign an IP address to the IP camera in the **IP Camera** setting screen in **Profile Option**.



This screen allows you to enable or disable IP cameras visible by PA users. You may specify which IP camera can be viewed from your **IP Camera** tab.

### 3.3.2 Operating IP Camera

When you start using the IP camera functions, you are requested to enter the username and password that you assigned when configuring the IP camera.

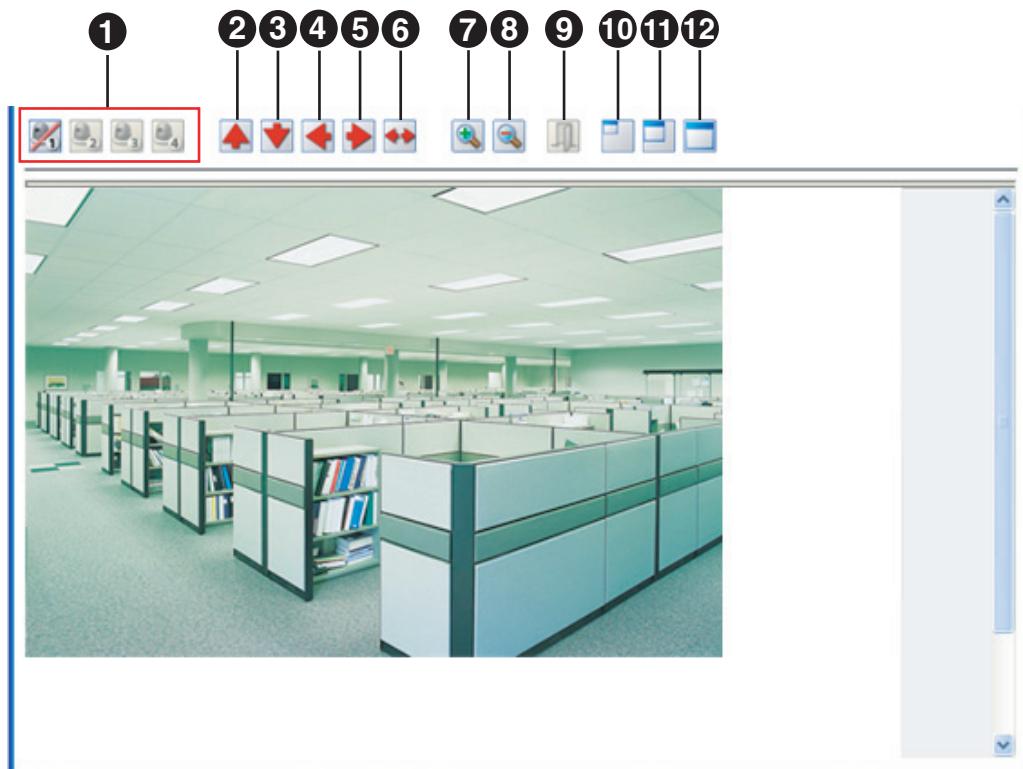


#### **IMPORTANT**

Please refer to the manuals included with your IP camera for details about connecting your camera.

### 3.3.2 Operating IP Camera

The following functions can be controlled in the **IP Camera** tab.



① Select IP camera



Starts viewing



Stops viewing

- ② Moves the camera view upward
- ③ Moves the camera view downward
- ④ Moves the camera view to left
- ⑤ Moves the camera view to right
- ⑥ Pan scanning from left to right
- ⑦ Zoom in
- ⑧ Zoom out
- ⑨ Opens the door
- ⑩ Small screen size
- ⑪ Medium screen size
- ⑫ Large screen size

#### Doorphone/Door Opener

- If a doorphone/door opener module is installed, it is possible to open doors remotely using the PA application. To use this feature, the IP camera can be configured to monitor activity at the door. When a call is initiated from the door, you can monitor the door from the **IP Camera** tab.

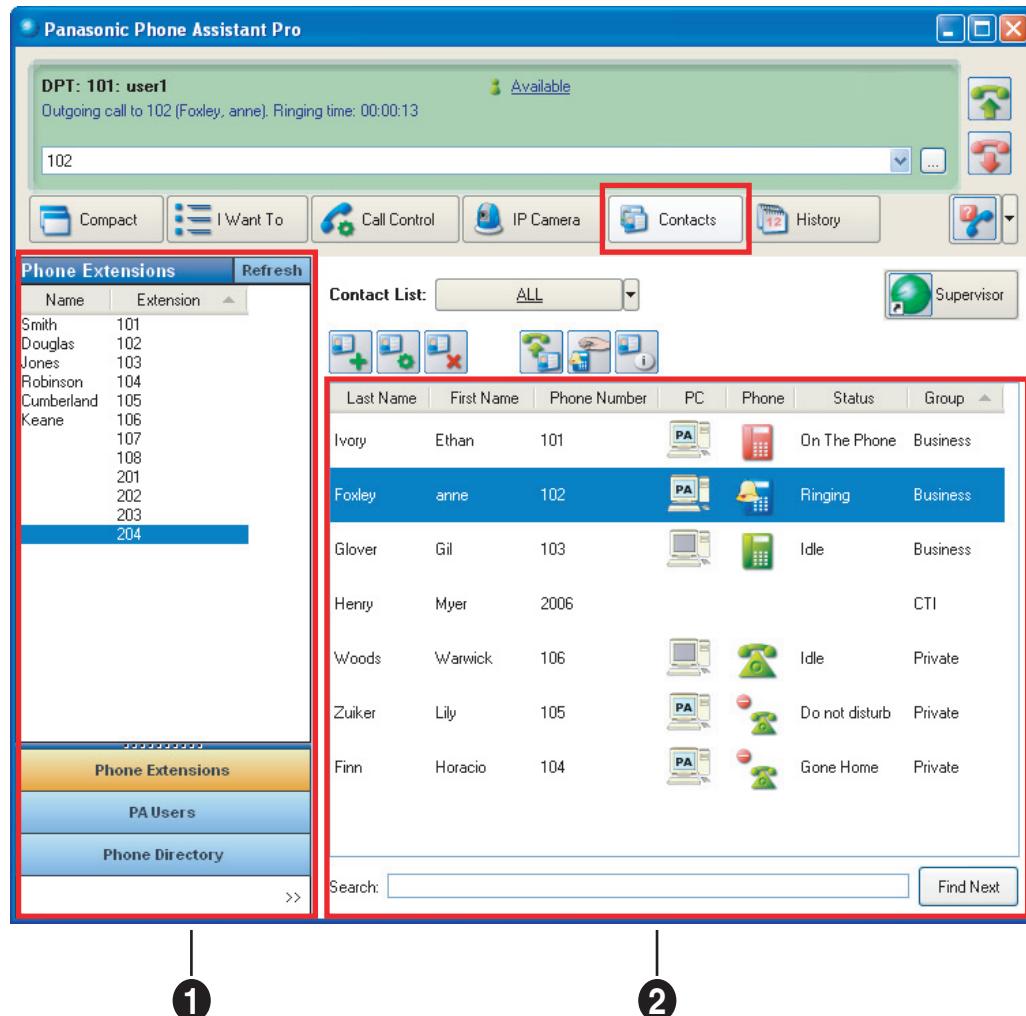
- Doorphone link can be set for each IP camera by selecting the doorphone number and name.

### **IMPORTANT**

Please refer to the Panasonic Hybrid IP-PBX manuals for details about the PBX settings to use doorphone.

## 3.4 Contacts Tab

There are 2 sections that show your contacts.



**① Contacts Directory List (CDL)**

The CDL is the central repository of all contacts available in the PA Server, PBX and Outlook.

**② Contact List**

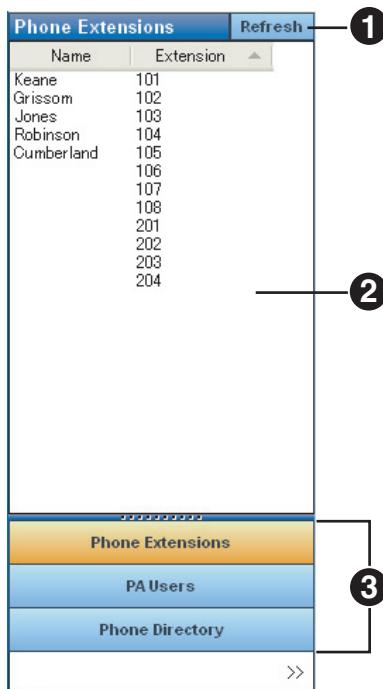
The personal Contact List can be edited.

The following buttons are available in the **Contacts** tab.

### 3.4.1 Contacts Directory List (CDL)

Button	Description
	Add Contact
	Edit Contact
	Delete Contact
	Dial Phone Number
	Pick up this extension
	Show PA User's Contact Info

### 3.4.1 Contacts Directory List (CDL)



① Refresh button  
Obtains the latest information from the PBX.

② List of the selected contact directory

You can sort the list by clicking the column headings. By default, the list is sorted by name.

③ Contact directory list

There are 3 kinds of CDLs (by default), as follows:

- Phone Extensions (all the extension numbers available in the PBX system).
- PA Users (all the PA users available from the PA Server).
- Phone Directory (System Speed Dialing in the PBX).

**Note**

In addition to the default CDLs, you may add a CDL from Outlook. Please refer to 3.4.4 Importing/Editing Outlook Contacts for details.

## 3.4.2 Contact List

The Contact List is intended to be a personal contact repository to store frequently dialed numbers locally. When the mouse is placed over a contact in the Contact List field, you can right-click to open up a context menu in order to edit/delete/view the contact information.

You can also dial the specified number/extension by double-clicking the contact in the Contact List.

Last Name	First Name	Phone Number	PC	Phone	Status	Group
Finn	Horacio	101		Dial number		Business
Sidle	Lily	102		Add a new contact		Business
Glover	Gil	103		Edit contact		Business

Dial number  
 Add a new contact  
 Edit contact  
 Delete contact      Del  
 Pick up this extension  
 View PA User info

The following icons appear in the Contact List. If the contact is not a PA user, icons will not appear.

Phone Type				Status
DPT/APT	SLT	IP-PT	PS	
				Extension is idle.
				Extension is ringing.
				Extension is on the phone.
				Absent Message/DND is set.

If the contact is an extension (except PS), the following icons are displayed in the **PC** column.



Logged in to PA

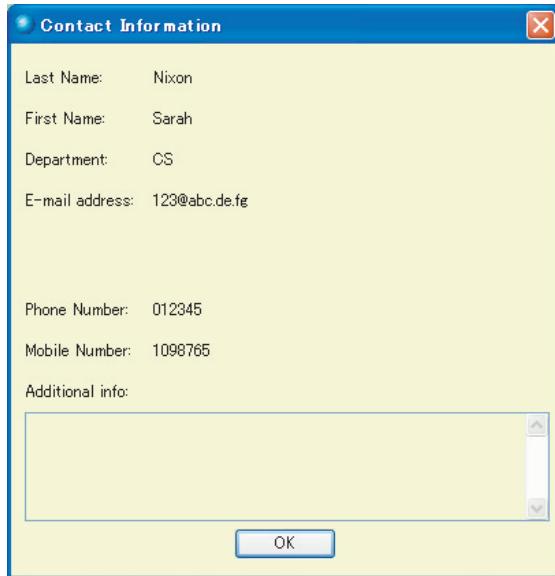
### 3.4.2 Contact List



Logged off

## PA User Detailed Information

When a contact is highlighted in the Contact List field, clicking the Show PA User's Contact Info button displays the contact's detailed information that is stored in the PA Server.

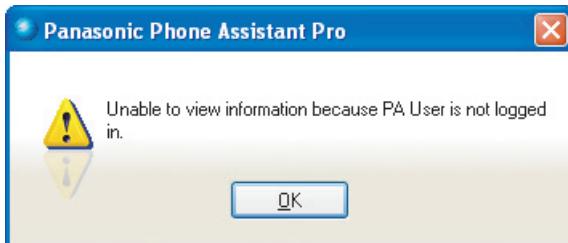


### Note

- If a contact in the Contact List is not a PA user, the following notification screen appears.



- If a contact in the Contact List is not logged in to PA, the following notification screen appears.



## Adding a New Contact

You can add a new contact in the following 3 ways.

- Click the Add a new contact button.
- Right-click on a blank space in the Contact List and select Add a new contact from the context menu.



- Drag a contact from a CDL into the Contact List field.

When you add a new contact, the New Contact screen appears.



- Enter the information of the new contact. All fields in this screen are required.
- Click **OK** to store this contact.

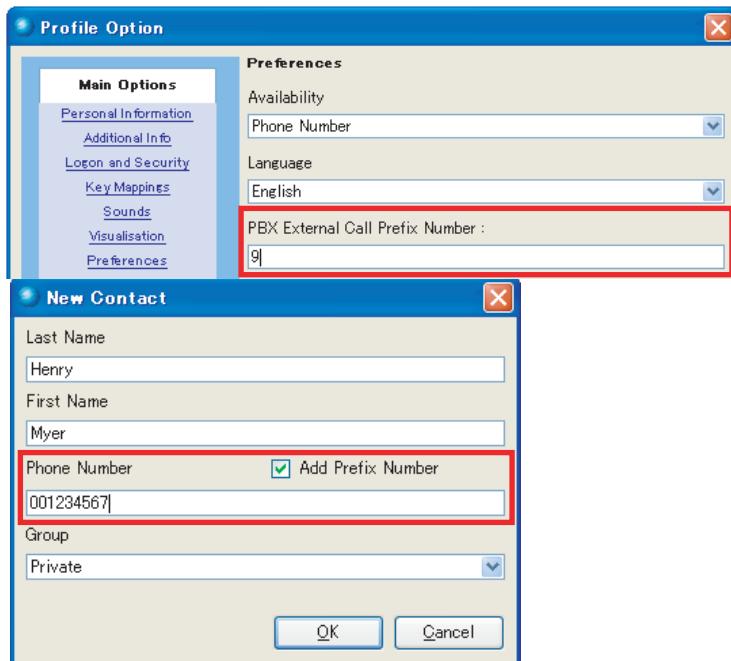
### Note

- If **Add Prefix Number** is selected, a prefix number will be added automatically when you dial this contact.
- If the first digit of the phone number is same as the **PBX External Call Prefix Number** in the Preferences in **Profile Option**, it is automatically removed and the **Add Prefix Number** check box is selected.

### 3.4.2 Contact List

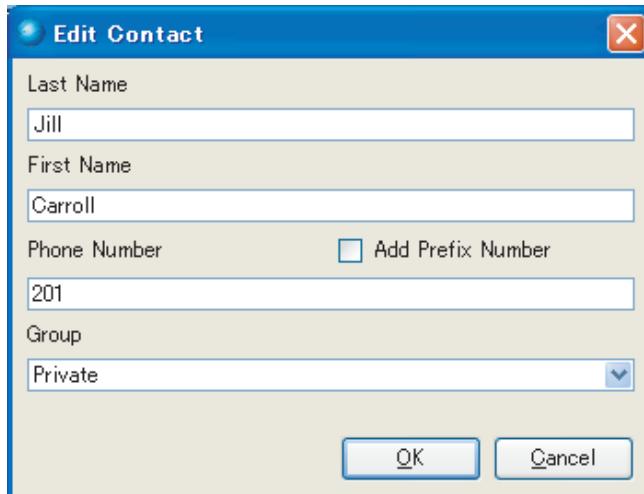
For example:

Name: Henry Myer  
Phone number: 9001234567



## Editing a Contact

1. Select the contact to edit.
2. Click the Edit Contact button.  
—or—  
Right-click the selected contact and select Edit contact from the context menu.



The Edit Contact screen appears.

3. Edit the Contact.
4. Click **OK** to apply the changes.

## Deleting a Contact

1. Select the contact that you want to delete.
2. Click the Delete Contact button.  
—or—  
Right-click the selected contact and select Delete Contact from the context menu.
3. The following confirmation screen appears.



4. Click **Yes** to remove from the Contact List field.

## Searching for a Contact

You can search for a specific contact in the Contact List field.

Last Name	First Name	Phone Number	PC	Phone	Status	Group
Myer	Henry	3012			Private	
Green	Alex	104			In a Meeting	Private
Woods	Warwick	105			Do not disturb	Private
Rosenberg	Anthony	108			Idle	CTI
Foxley	Emma	204				CTI
Sidle	Lily	102			Idle	Business
Finn	Horacio	101			Idle	Business
Glover	Gil	103			Idle	Business

Search:  Find Next

The following data will be searched.

- Last Name
- First Name
- Phone number

A maximum of 255 characters can be entered in this field.

Found items will be sorted in the following priority:

Last Name → First Name → Phone number

### 3.4.3 Contact List Group

---

#### Note

Only the current contact list group is searched.

## 3.4.3 Contact List Group

It is possible to select the desired contact list group by clicking the arrow button as shown below:



#### Note

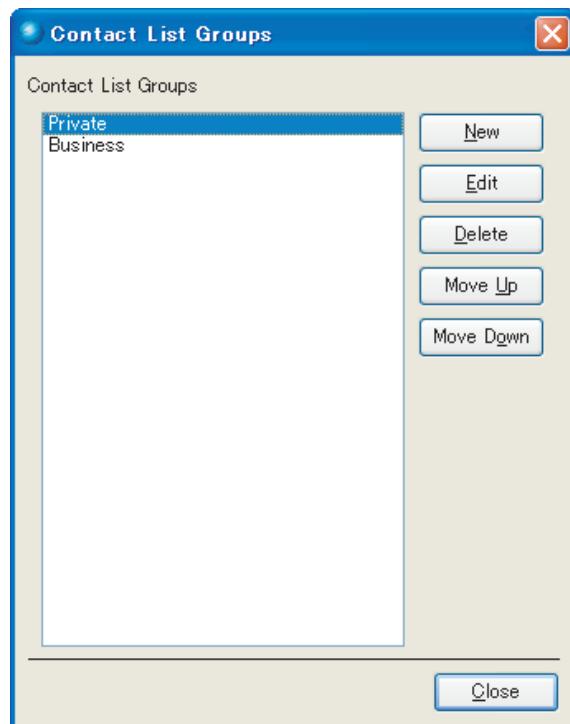
- There are 2 default groups (Private/Business).
- You may have up to 100 groups in total (all the group names appear in the drop-down list).
- Each group may contain 100 contacts.

### 3.4.3.1 Customizing a Contact List Group

The Customize... option allows you to do the following:

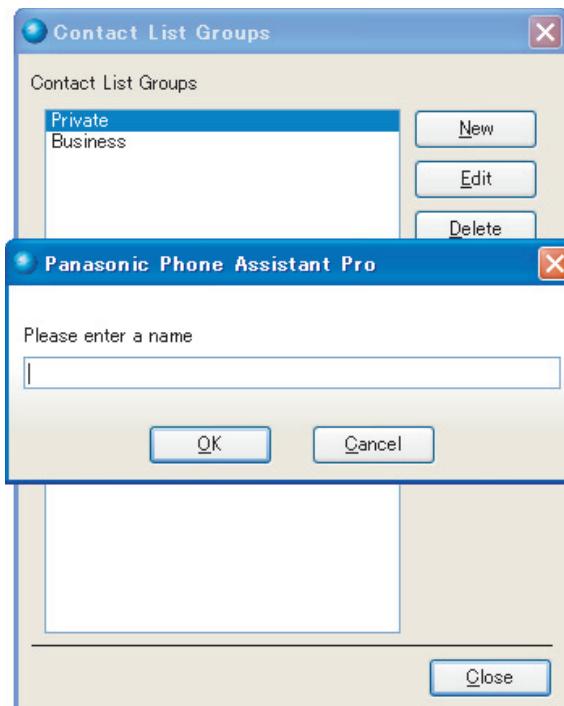
- Create a new contact list group
- Edit a contact list group
- Delete a contact list group
- Rearrange a contact list group

Selecting Customize... from the drop-down list displays the Contact List Groups screen.



## Creating a New Contact List Group

1. Click **New**.



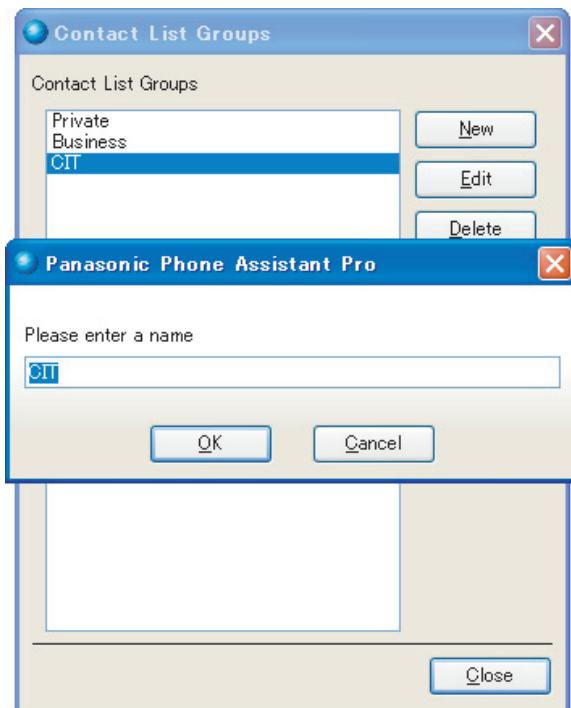
2. Assign a contact list group name.

### 3.4.3 Contact List Group

3. Click **OK** to store a new group.

## Editing a Contact List Group

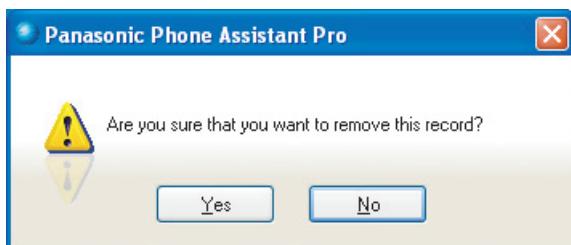
1. Select the contact list group that you want to edit.
2. Click **Edit**.



3. Edit the contact list group name.
4. Click **OK** to apply the changes.

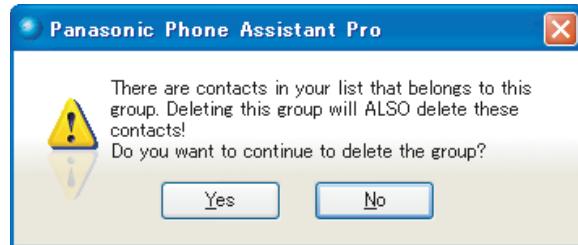
## Deleting a Contact List Group

1. Select the contact list group that you want to delete.
2. Click **Delete**. A confirmation dialog box will appear.



**Note**

If the group to be deleted contains contacts, the following confirmation dialog box will appear. Click **Yes** to delete all the contacts that belong to that group, and **No** to cancel the deletion of the group.



## Rearranging a Contact List Group

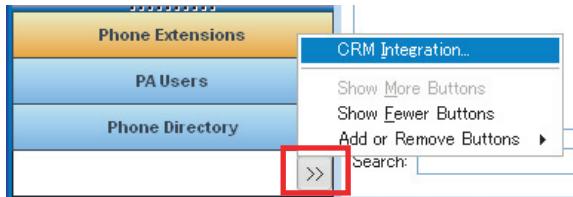
To rearrange a contact list group, select the desired group, and:

- click **Move Up** or **Move Down**.
- or—
- drag the group to the desired position.

## 3.4.4 Importing/Editing Outlook Contacts

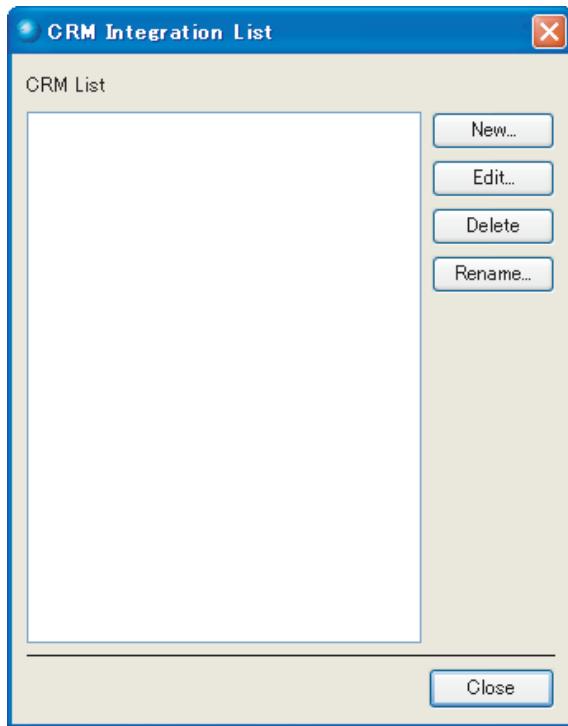
You may import contacts from Outlook into the CDL and may also edit/delete/rename the contact that appear in the CDL.

1. Click the double arrow button and select CRM Integration... from the drop-down list.

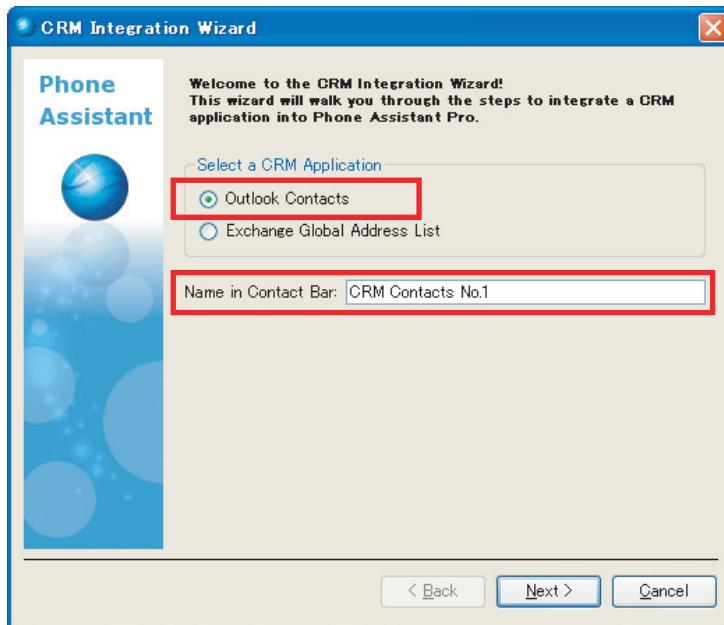


### 3.4.4 Importing/Editing Outlook Contacts

The CRM Integration List screen appears.



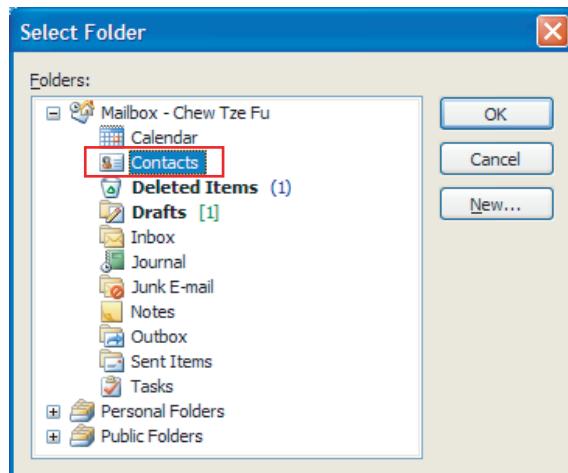
2. Click **New...** to import contacts.  
—or—  
Click **Edit...** to change the CRM List name or its contents.



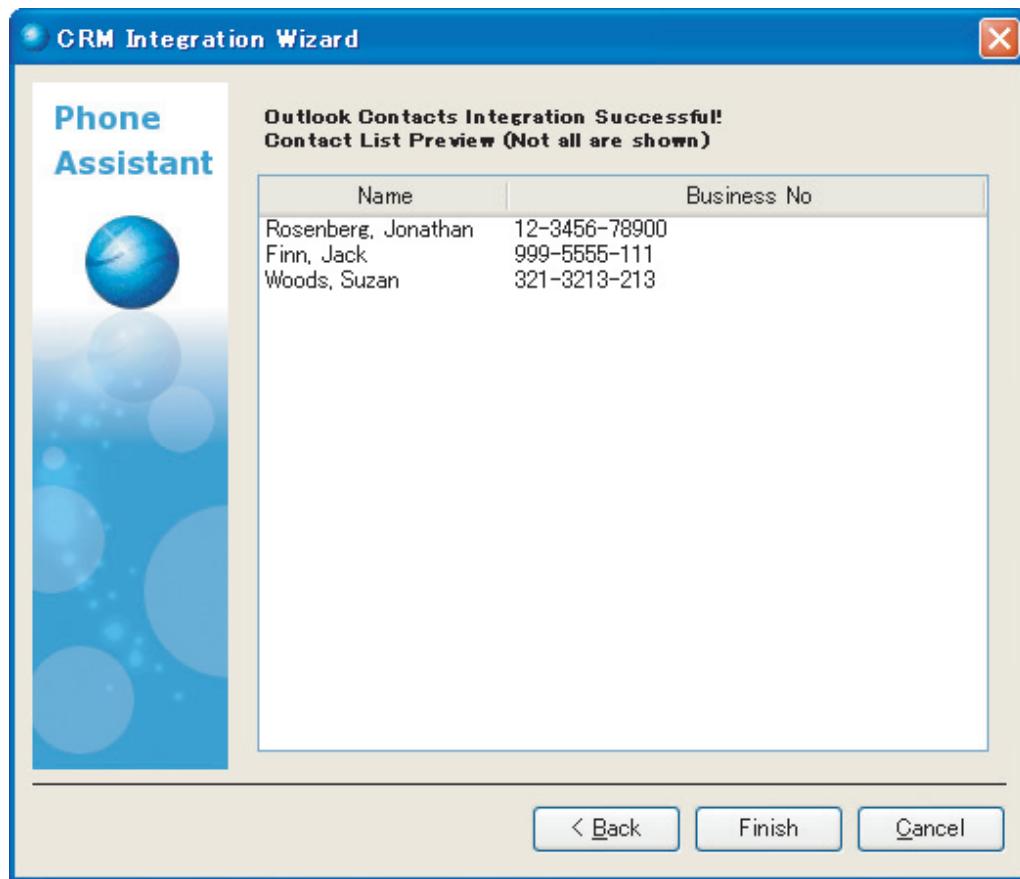
The CRM Integration Wizard screen appears.

3. Click **Outlook Contacts**, and enter a name into the **Name in Contact Bar** input field.
4. Click **Next** to proceed.

5. Click the desired Contacts folder and click **OK**.



6. Click **Finish**.

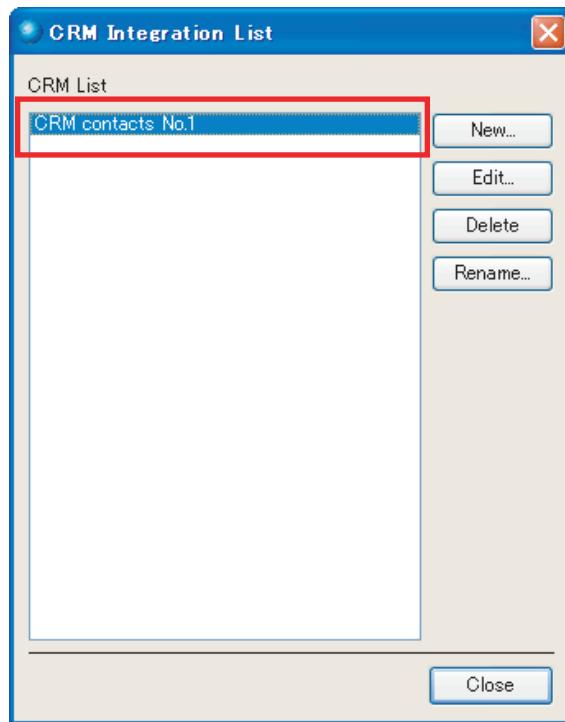


**Note**

All of the contacts listed in the CRM Integration Wizard screen are imported. You may not select the contacts to import.

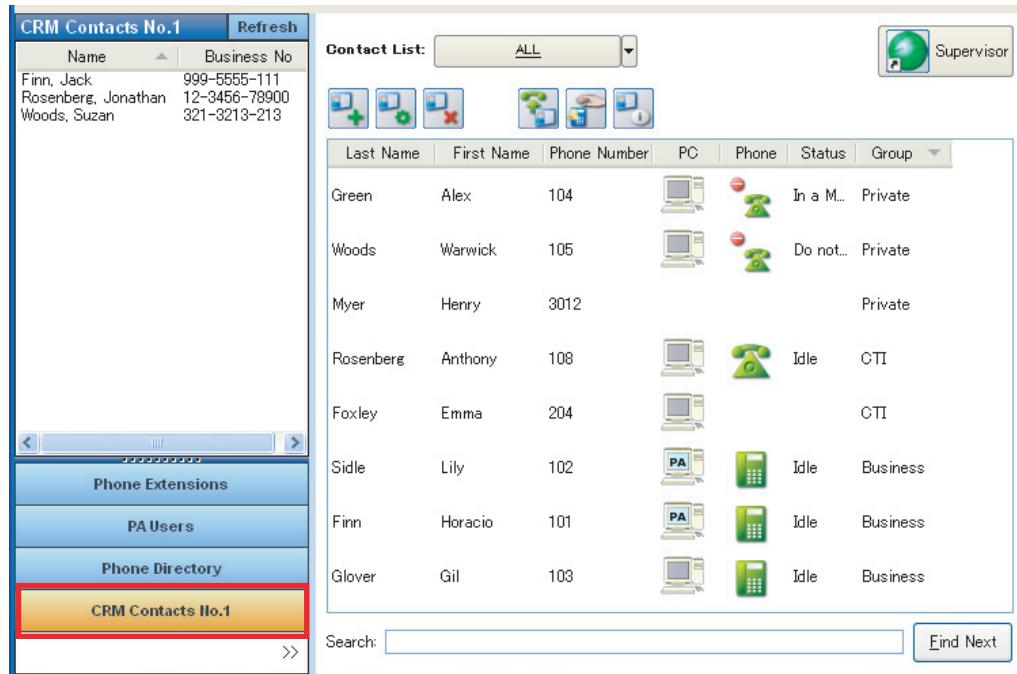
### 3.4.4 Importing/Editing Outlook Contacts

7. The assigned name for the contacts appears in the CRM List field.



8. Click **Close**.

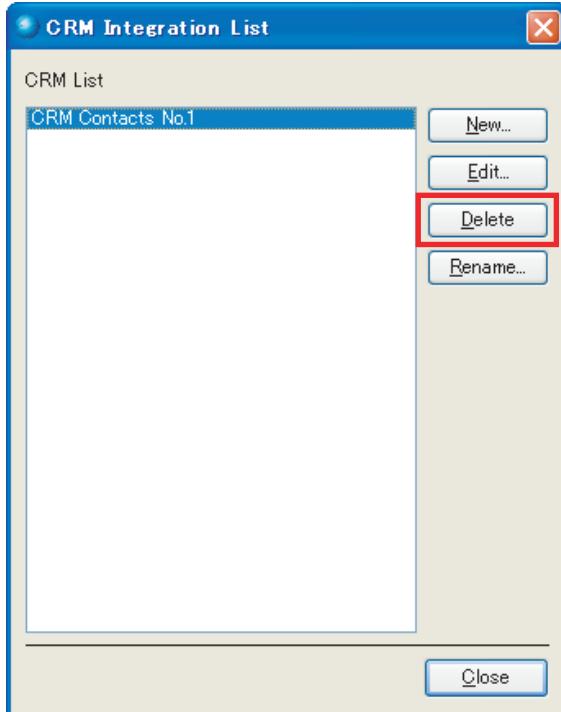
9. The imported contacts are now added to the CDL.



### 3.4.4.1 Deleting Outlook Contacts

You may delete the contacts imported from Outlook.

1. Click the double arrow button and select CRM Integration... from the drop-down list.
2. Click **Delete** in the CRM Integration List screen.



3. A confirmation dialog box will appear. Click **Yes** to complete the deletion.



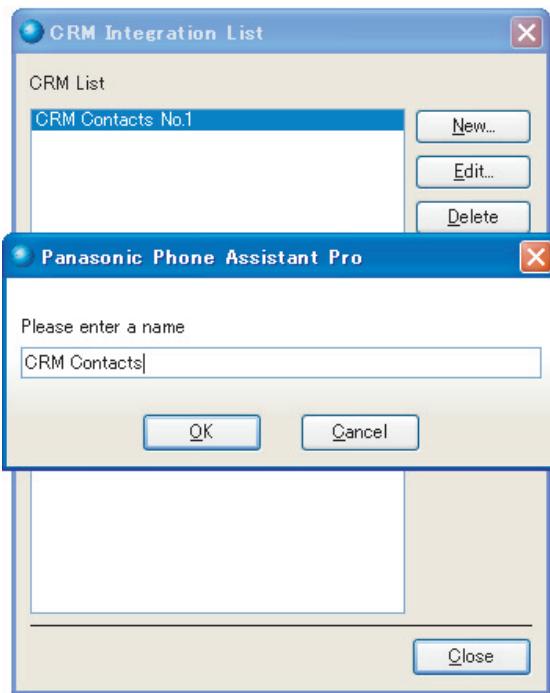
### 3.4.4.2 Renaming Outlook Contacts

You can change the name of a contact list imported from Outlook.

1. Click the double arrow button and select CRM Integration... from the drop-down list.

### 3.4.5 Picking Up Another Extension's Call

2. Click **Rename...** in the CRM Integration List screen.



3. Change the contact name.
4. Click **OK**.

### 3.4.5 Picking Up Another Extension's Call

You can pick up an incoming call for a selected contact in a Contact List in the following 2 ways.

- Click the Pick up this extension button.



- Right-click the selected contact and select Pick up this extension from the context menu.

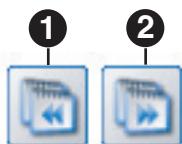


## 3.5 History Tab

All incoming and outgoing call information for your extension is shown in the **History** tab.

Type	Caller	Called	Date Time	Duration	Trunk	Tag
101 (Finn, Horacio)	104 (Green, Alex)	2006-12-20 00:26:54	00:00:08	Internal		
101 (Finn, Horacio)	103 (Glover, Gil)	2006-12-20 00:21:58	00:00:07	Internal		
101 (Finn, Horacio)	102 (Sidle, Lily)	2006-12-20 00:11:17	00:00:16	Internal		
101 (Finn, Horacio)	102 (Sidle, Lily)	2006-12-15 06:42:28	00:00:45	Internal		
102 (Sidle, Lily)	101 (Finn, Horacio)	2006-12-13 02:42:44	00:00:06	Internal		
101 (Finn, Horacio)	102 (Sidle, Lily)	2006-12-13 02:40:22	00:00:13	Internal		
101 (Finn, Horacio)	104 (Green, Alex)	2006-12-04 01:04:38	00:00:03	Internal		
102 (Sidle, Lily)	101 (Finn, Horacio)	2006-12-04 01:03:05	00:02:24	Internal		

It is possible to view the history of past calls depending on the call type (e.g., incoming missed calls, outgoing unanswered calls, etc.) by using the Call Type buttons. Up to 100 records per page can be displayed for each call type.



**① Previous** button

**② Next** button

Click **Next** to view the next page, and click **Previous** to view the previous page.

### Note

- When an external incoming call is transferred from an extension/Voice Processing System (VPS), the incoming call is recorded twice on the receiving extension's call log: once for the external incoming call log, and once for the intercom call from the extension/VPS.
- When an extension receives a blind-transfer call, the call from the transferring extension will be recorded as a missed call on the receiving extension's call log.

## Call Type Button

The following buttons can be used to change the type of calls that are displayed in the **History** tab.

Button	Type of Call
	Show All Calls
	Show Incoming Missed Calls
	Show Incoming Received Calls
	Show Outgoing Unanswered Calls
	Show Outgoing Answered Calls

## Call History Information

- Type
  - Incoming Missed Calls
  - Incoming Received Calls
  - Outgoing Unanswered Calls
  - Outgoing Answered Calls
- Caller
- Caller Name
- Called
- Called Name
- Date/Time of the call
- Duration of the call (h: min: s)
- Trunk
- Tag

## Calling a Party from the Call History

There are 2 ways to make a call using the call history in the **History** tab.

- double-clicking the desired call history item.
- right-clicking the desired call history item and selecting Dial number.

Type	Caller	Called	Date Time	Duration	Trunk	Tag
	102 (Sidle, Lily)	101 (Finn, Horacio)		00:00:05	Internal	
	103 (Glover, Gil)	101 (Finn, Horacio)		00:00:11	Internal	

## Adding a Contact from the Call History

It is possible to add a contact to a Contact List by right-clicking the desired call history item and selecting Add to Contact List.

Type	Caller	Called	Date Time	Duration	Trunk	Tag
	101 (Finn, Horacio)	102 (Sidle, Lily)	2006-04-19 01:35:35	00:00:31	Internal	
	101 (Finn, Horacio)	102 (Sidle, Lily)	2006-04-19 01:35:43	00:00:06	Internal	

## Sorting/Column Moving Possibilities

It is possible to:

- Sort history items according to each column heading. This is performed by clicking the desired column header.
- Change the order of the columns displayed. This is performed by selecting and dragging a column header to the desired location.

## Searching

Call History items can be searched using the values (e.g., 102, Chris Martin) for the following topics:

- Caller
- Called
- Caller Name
- Called Name

Searched items will be listed in the following priority:

Caller → Called → Caller Name → Called Name

History – All						
Type	Caller	Called	Date Time	Duration	Trunk	Tag
	103 (Glover, Gil)	101 (Finn, Horacio)	2006-04-19 01:39:12	00:03:26	Internal	
	101 (Finn, Horacio)	104 (Green, Alex)	2006-04-19 01:38:55	00:00:01	Internal	
	103 (Glover, Gil)	101 (Finn, Horacio)	2006-04-19 01:38:34	00:00:21	Internal	
	101 (Finn, Horacio)	102 (Sidle, Lily)	2006-04-19 01:37:51	00:00:14	Internal	
	101 (Finn, Horacio)	102 (Sidle, Lily)	2006-04-19 01:37:07	00:00:19	Internal	
	101 (Finn, Horacio)	103 (Glover, Gil)	2006-04-19 01:36:50	00:01:15	Internal	
	101 (Finn, Horacio)	103 (Glover, Gil)	2006-04-19 01:36:10	00:00:14	Internal	
	101 (Finn, Horacio)	103 (Glover, Gil)	2006-04-19 01:35:41	00:00:15	Internal	
	101 (Finn, Horacio)	103 (Glover, Gil)	2006-04-19 01:35:13	00:00:47	Internal	

Search:

## Adding/Editing a Call Tag

The Tag column in the **History** tab can be used as a memo. You can input information about the call or edit that information using the Show Call Tag button.

### 3.5 History Tab



Show Call Tag button

1. Click the Show Call Tag button.

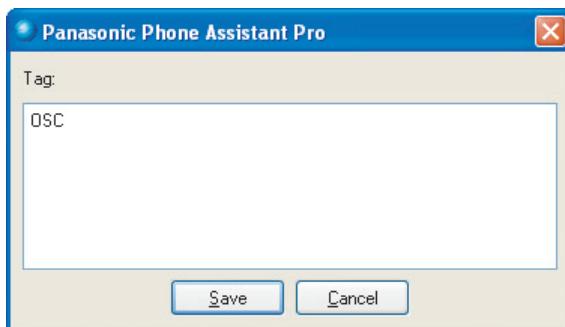
—or—

Right-click the call history item and select **New/Edit Call Tag**.

Type	Caller	Called	Date Time	Duration	Trunk	Tag
	103 (Glover, Gil)	101 (Finn, Horacio)		00:00:28	Internal	
	101 (Finn, Horacio)	102 (Sidle, Lily)		00:00:06	Internal	

The tag input screen will appear.

2. Enter or edit the tag information.



If the call tag information has already been set, that information will be displayed in the call tag screen.

#### Note

A maximum of 255 characters can be entered in this field.

3. Click **Save**.

The call tag information appears in the **Tag** column.

Type	Caller	Called	Date Time	Duration	Trunk	Tag
	103 (Glover, Gil)	101 (Finn, Horacio)	2006-04-18 02:24:18	00:00:28	Internal	OSC
	101 (Finn, Horacio)	102 (Sidle, Lily)	2006-04-18 02:24:02	00:00:06	Internal	
	101 (Finn, Horacio)	102 (Sidle, Lily)	2006-04-18 02:23:53	00:00:06	Internal	

---

## ***Section 4***

### ***Operation with Buttons***

## 4.1 Answer or Dial Button

The Answer or Dial button has 2 functions:



- Make a call  
If there is no active call, and if there is a number in the Information Panel input field, clicking this button will dial that number.
- Answer a call  
If there is an incoming call, you can answer it by clicking this button.

## 4.2 Hang Up Button

The Hang Up button has only one function:



- Hang up a call  
If there is an ongoing call, you may end the call by clicking this button.

## 4.3 Function Preset List Button



The Function Preset List button allows for quick access to frequently used functions. Up to 20 functions can be customized allowing the following operations/settings to be performed:

- Forwards/DND settings
- Absent Message setting
- Dialing a telephone number

### 4.3.1 Customizing Functions

Functions can be created/changed as follows:

1. Click the arrow button next to the Function Preset List button and select Customize... from the drop-down list.



2. The Function Presets screen appears.

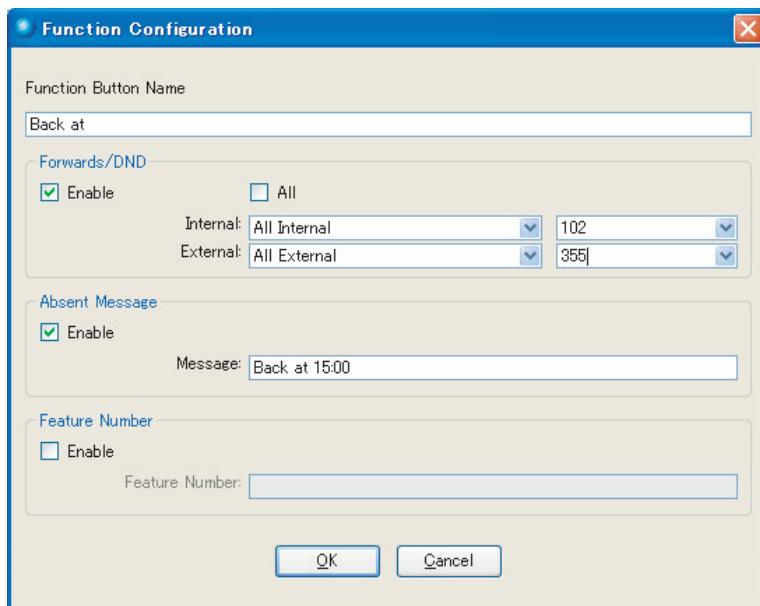


#### 4.3.1 Customizing Functions

##### Note

- By default, there are no functions customized in the Function List.
- To add a new function, click **New** (when you attempt to define more than 20 functions, an error message appears).
- To edit an existing function, select **Edit**.
- To delete an existing function, select **Delete**.
- To rearrange the list items, select an item and click **Move Up** or **Move Down**.

#### 3. Click either **New** or **Edit**.



#### 4. The following can be customized in the Function Configuration screen below.

##### • **Function Button Name**

It is possible to assign a name for each function (max. 32 characters). This will be displayed in the Function Presets screen when the Function Preset List button is clicked.

##### • **Forwards/DND**

It is possible to set the Forward or DND settings shown below for internal and/or external calls. If a forward setting is selected, the forward destination (max. 32 digits) can be specified.

- For both internal and external Forwards/DND setting to be active, the **Enable** check box must be checked.
- For both internal and external Forwards/DND setting to be the same, the **All** check box must be checked.

##### **For incoming calls from other extensions:**

- All Internal  
Any calls originating from an internal extension are forwarded to the specified number.
- Busy Internal  
When an extension is busy, internal calls are forwarded to the specified number.
- No Answer Internal  
When there is no answer at an extension, internal calls are forwarded to the specified number.
- Busy/No Answer Internal  
When there is no answer at an extension or it is busy, internal calls are forwarded to the specified number.
- DND  
Sets the extension to busy.

- Off  
Turns off the Forwards/DND setting.

**For incoming calls from an outside line:**

- All External  
Any calls originating from an external extension are forwarded to the specified number.
- Busy External  
When an extension is busy, external calls are forwarded to the specified number.
- No Answer External  
When there is no answer at an extension, external calls are forwarded to the specified number.
- Busy/No Answer External  
When there is no answer at an extension or it is busy, external calls are forwarded to the specified number.
- DND  
Sets the extension to busy.
- Off  
Turns off the Forwards/DND setting.

- **Absent Message**  
In this field, you can set an Absent Message. If this option is enabled, the Absent Message is set to the message entered in the input field (max. 16 characters).
- **Feature Number**  
If enabled, it is possible for the specified telephone number (max. 32 digits) to be dialed when the function is performed. The supported characters are 0-9, "\*" and "#".

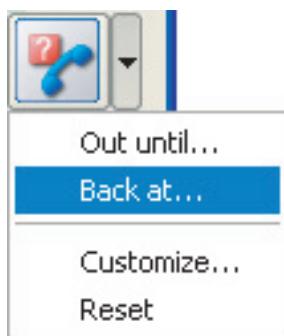
**Note**

Only the operations/settings that are enabled in the Function Configuration screen will be activated when the function is performed.

5. Select **OK** to save the function.

## 4.3.2 Performing a Function

Click the arrow next to the Function Preset List button and select the desired function from the drop-down list:

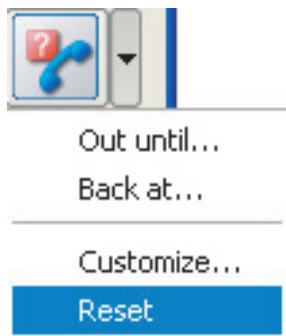


**Note**

Clicking the Function Preset List button will perform the first function in the Function List screen.

### 4.3.3 Canceling a Function

Clicking the arrow next to the Function Preset List button and selecting Reset from the drop-down list will perform the following:



- The Forwards/DND setting will be set to off.
- The Absent Message setting will be set to available.

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## **Section 5**

# ***Configurations***

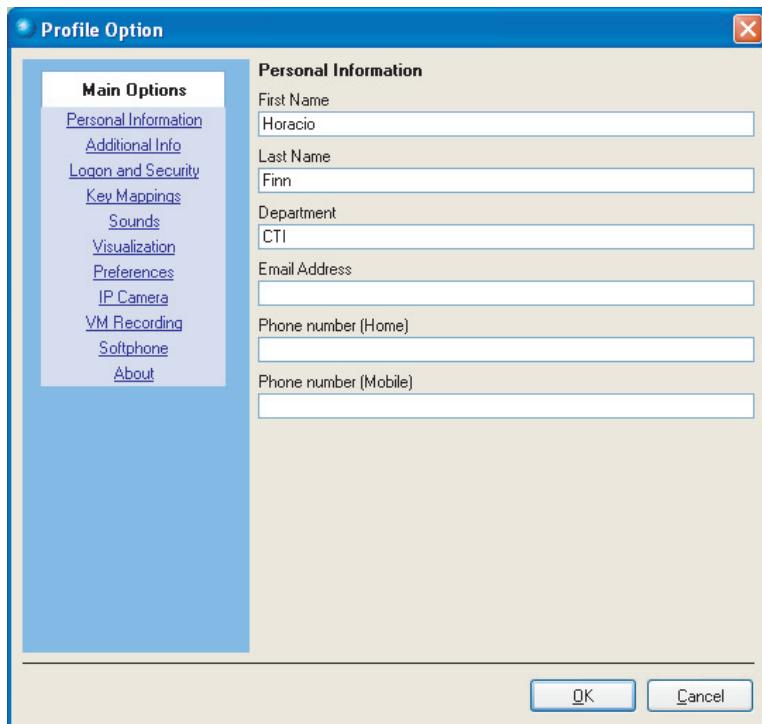
## 5.1 Profile Options

To configure your profile, select **Change my options...** in the **I Want To** tab. The following profile options are available:

### 5.1.1 Personal Information

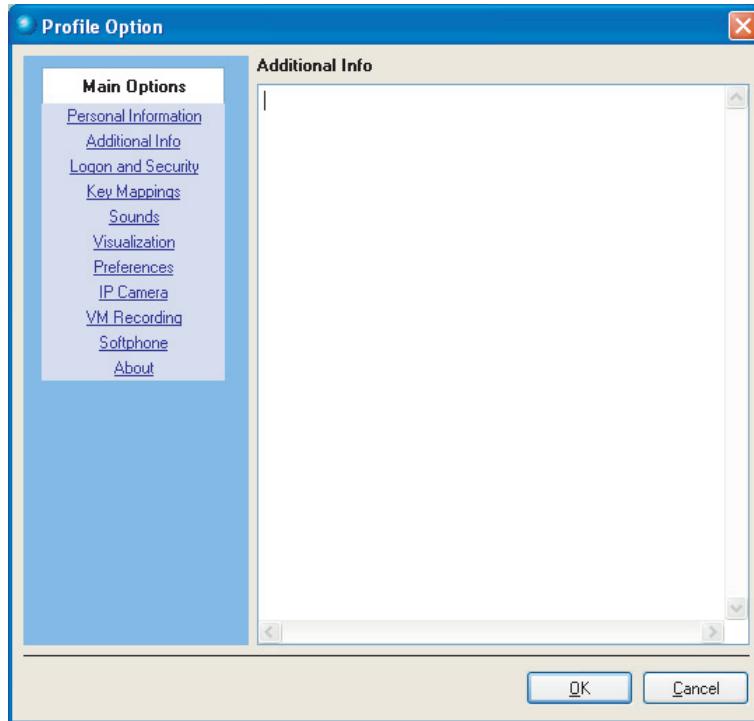
This screen displays your personal information, and is initially configured by the administrator. The values available for each field are limited as follows:

- **First Name**—max. 32 characters
- **Last Name**—max. 32 characters
- **Department**—max. 32 characters
- **Email Address**—max. 200 characters
- **Phone number (Home)**—max. 32 characters
- **Phone number (Mobile)**—max. 32 characters



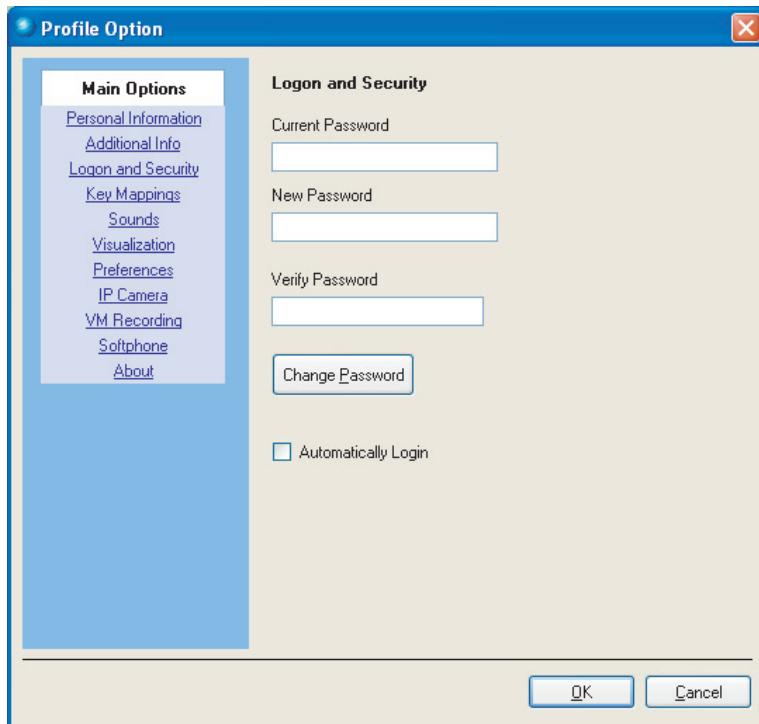
## 5.1.2 Additional Info

This area provides space for notes to be entered. This information can also be edited in the User Admin page of PA Manager. A maximum of 1000 characters can be entered.



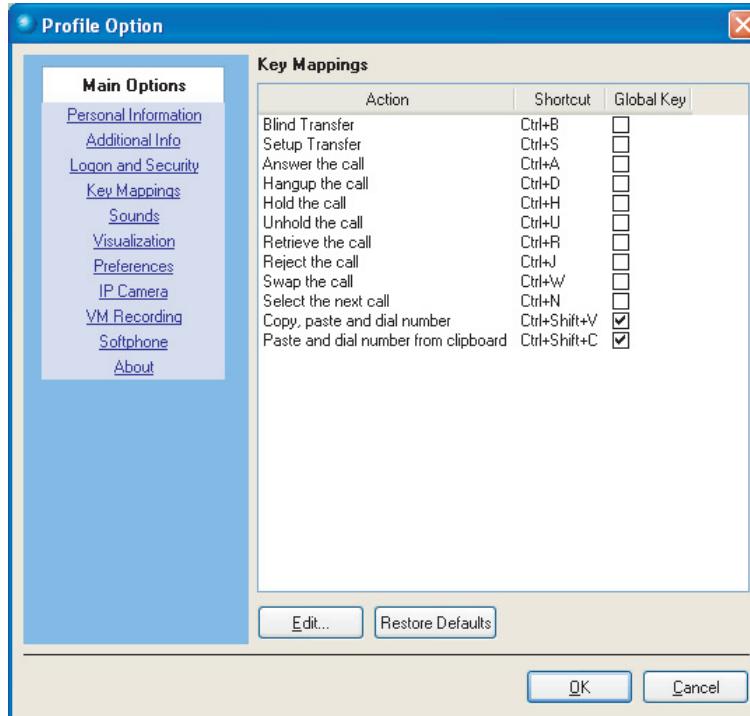
### 5.1.3 Logon and Security

This screen allows for the login password and Automatic Login setting to be changed. When the **Automatically Login** check box is checked, the login password does not need to be entered each time you launch the application.



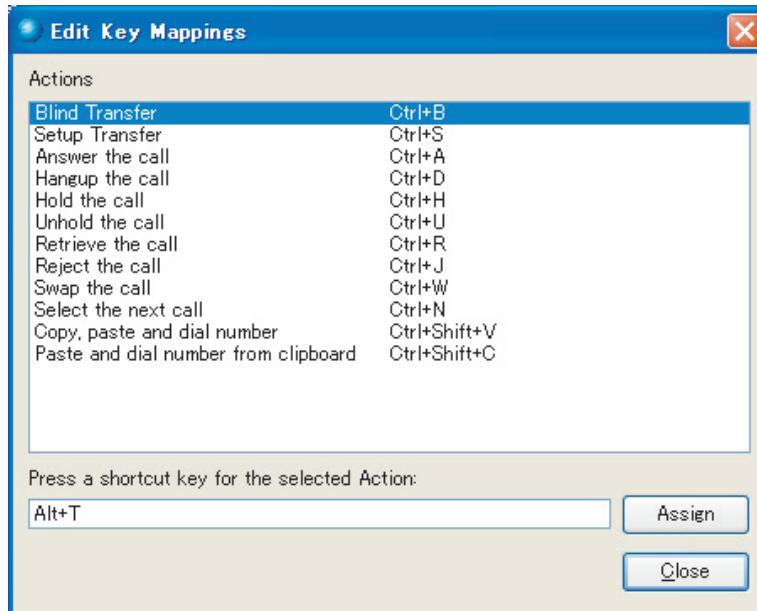
## 5.1.4 Key Mappings

This screen allows for shortcuts to be enabled for the functions shown in the screen below.



### Editing shortcut settings

It is possible to edit shortcuts by clicking **Edit...**



1. Select an Action.
2. Place the cursor in the shortcut key input field.
3. Press the desired shortcut key for the selected Action (e.g., CTRL+P, ALT+E, etc.).

## 5.1.5 Sounds

4. Click **Assign** to change the setting.

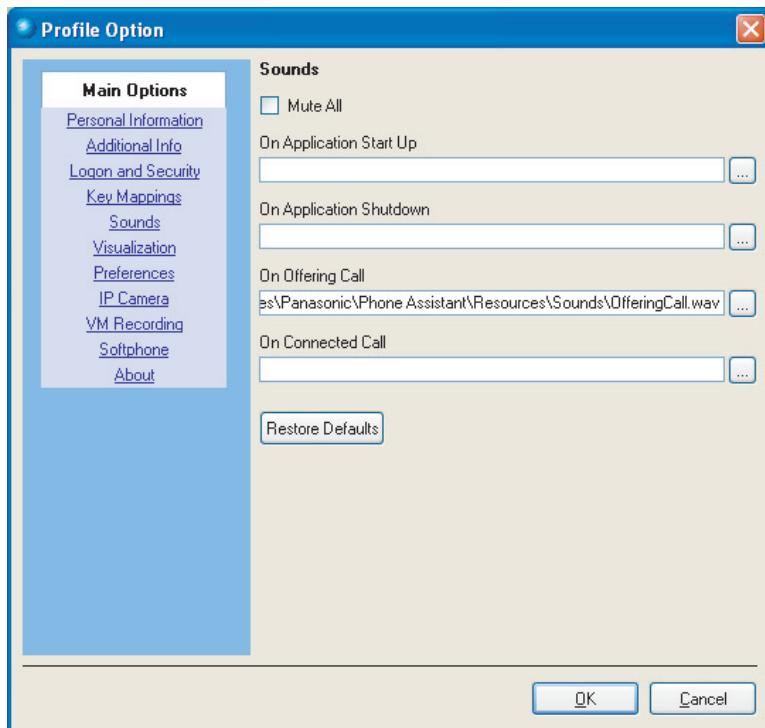
Clicking **Restore Defaults** returns the shortcuts to their default settings.

### Global Key check box

If the **Global Key** check box is selected, you can operate PA functions by using PA application shortcut keys even if other applications are active.

## 5.1.5 Sounds

This screen allows for sound notifications to be specified for the events shown in the screen below.



For each event, a WAV file can be specified by clicking the browse (...) button. When the **Mute All** check box is checked, all sound notifications are disabled.

Click **Restore Defaults** to set the default WAV file for each event.

## 5.1.6 Visualization

- **Application Appearance**

This option configures the appearance of the Taskbar and Notification area.

If **System tray** is selected, the icon below appears in the Notification area while PA is activated.



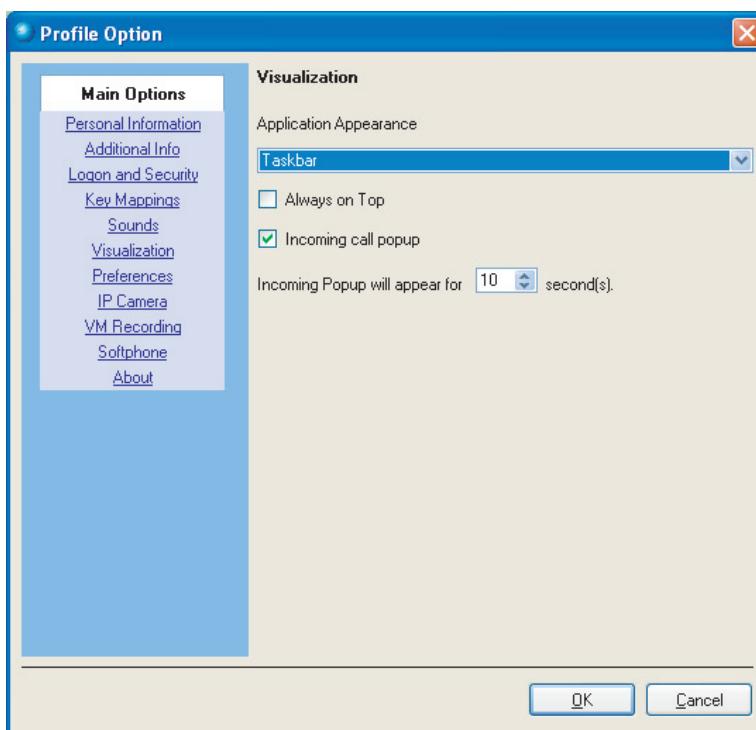
- **Always on Top**

This option allows PA to remain in front of all other running applications at all times.

- **Incoming call popup**

When checked, the Call Alert screen appears to notify you of an incoming call. Please refer to 3.2.2.2 Answering Calls for details.

Set the time duration to display the Incoming call popup when there is a call (default: 10 seconds).



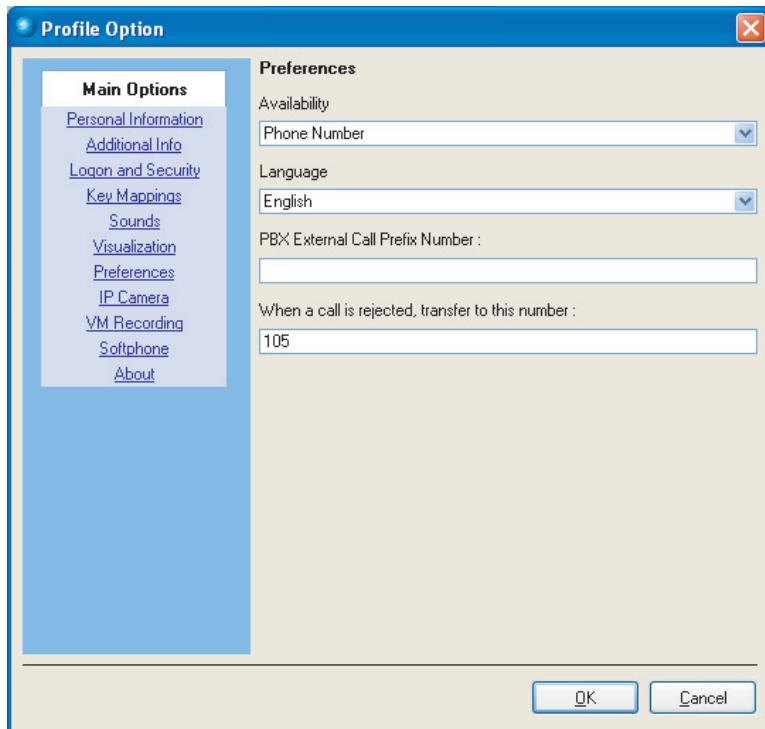
## 5.1.7 Preferences

This screen allows you to configure the following general preference settings:

- Availability**  
The availability option allows PA Network Console to view your availability options. You may select one of the following options:
  - Phone Number
  - Mobile Phone Number
  - E-mail
- Language**  
You may select the language of the interface from the list box.
- PBX External Call Prefix Number**  
You can enter the PBX external call prefix number for all external calls.
- When a call is rejected, transfer to this number**  
Specifies the extension or the mailbox number of the Voice Processing System to transfer rejected calls to.

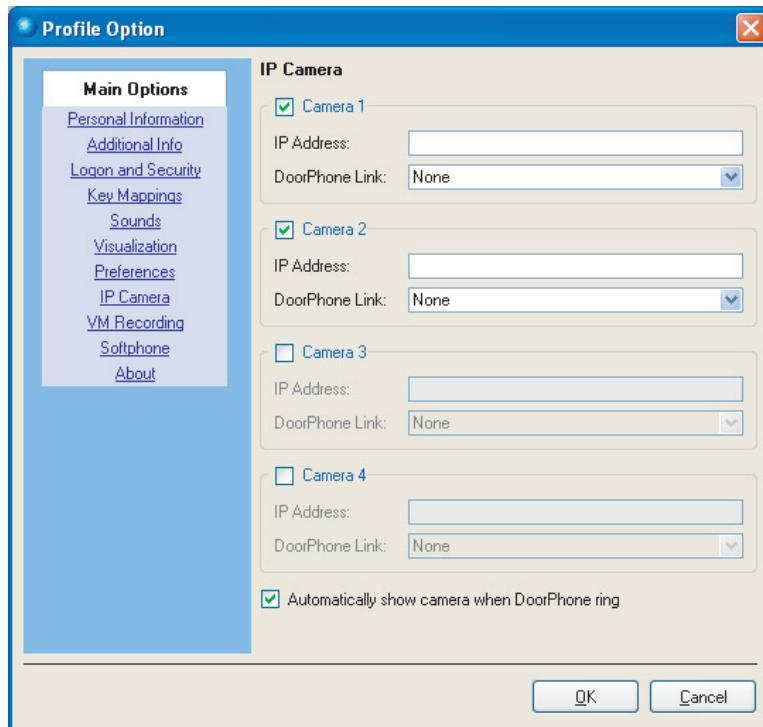
### Note

- If this field is left empty, calls cannot be rejected.



## 5.1.8 IP Camera

This screen allows you to enable or disable IP cameras visible by PA users. Please refer to 3.3 IP Camera Tab for details.

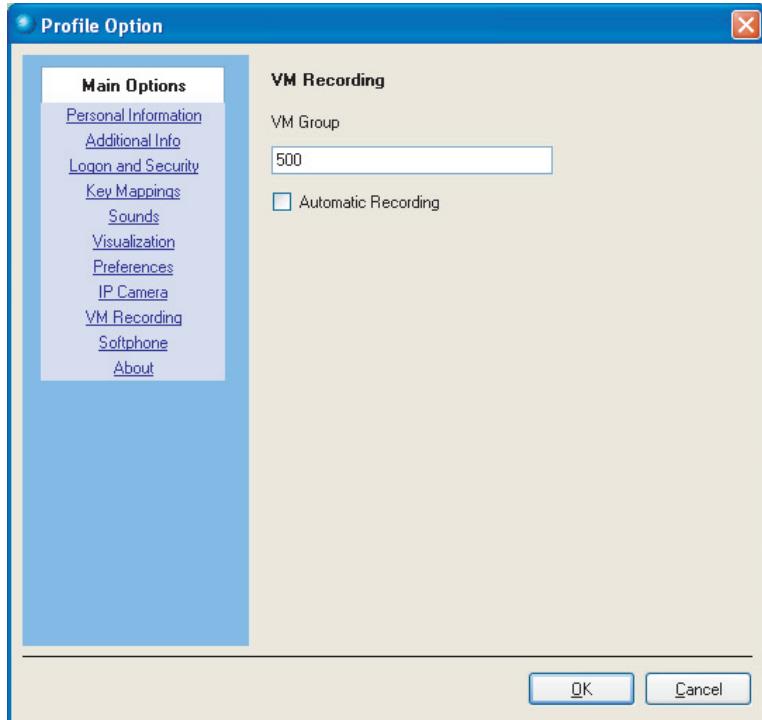


- **Automatically show camera when DoorPhone ring**

This option enables PA to open the **IP Camera** tab and display the IP camera feed automatically when a doorphone rings.

### 5.1.9 VM Recording

This screen allows you to set call recording preferences.

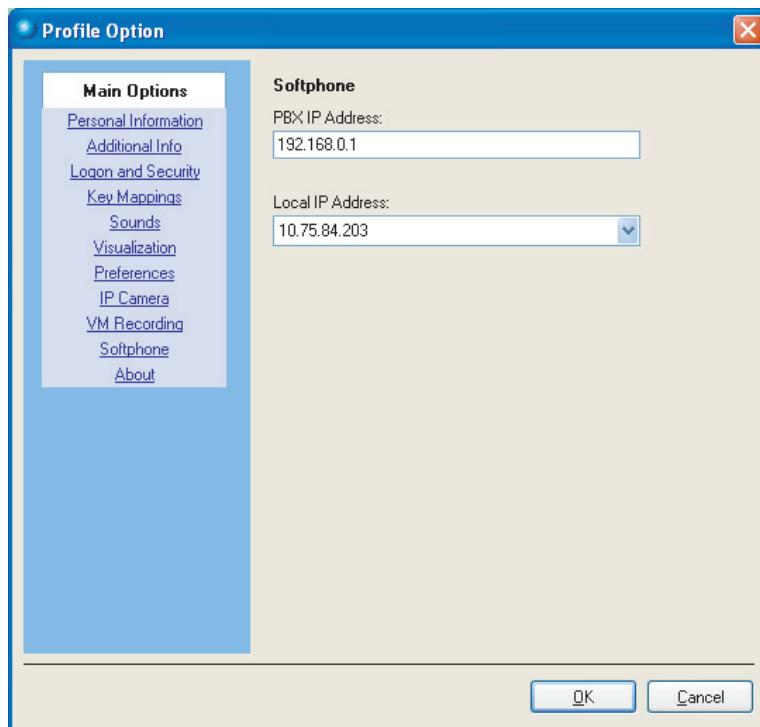


- Assign a **VM Group**.
- **Automatic Recording**  
If Automatic Recording is checked, recording starts automatically when a call is started.

## 5.1.10 Softphone

To use the Softphone function, the IP Softphone Module license needs to be registered.

Enter the **PBX IP Address** and **Local IP Address**. Please refer to 10.1 Using the Softphone for details.

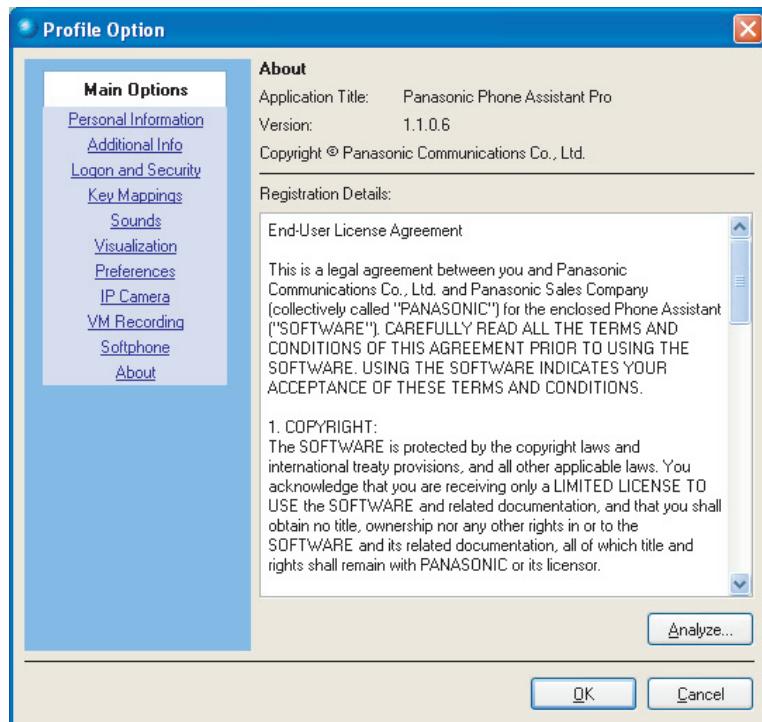


## 5.1.11 About

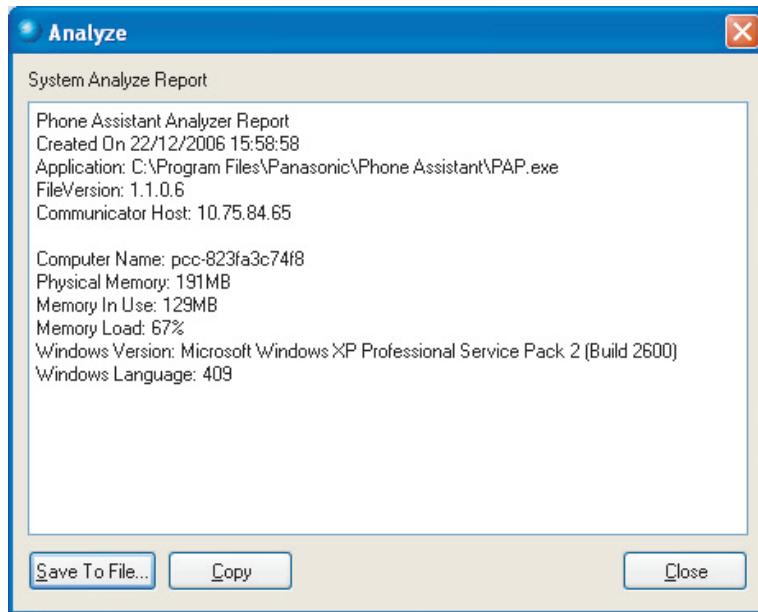
The About screen shows the following summary.

- Application Title
- Software Version
- Copyright Information
- Registration Details

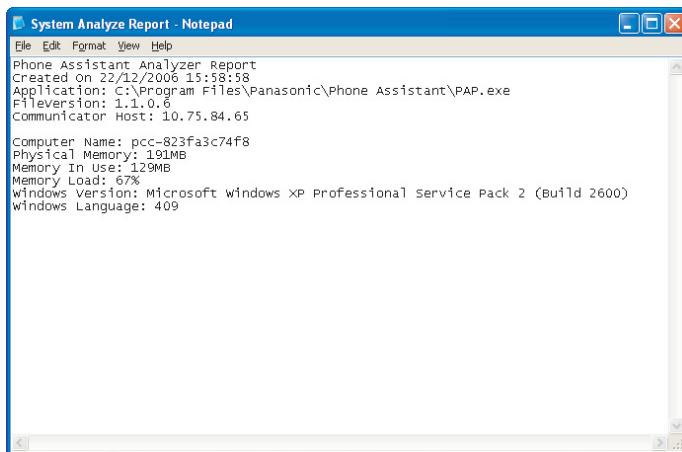
Clicking **Analyze...** will generate a System Analyze Report which can be copied to the clipboard or saved as a file.



Click **Save To File...** to specify the desired location to save the System Analyze Report.



An example of system information is shown below.



### 5.1.11 About

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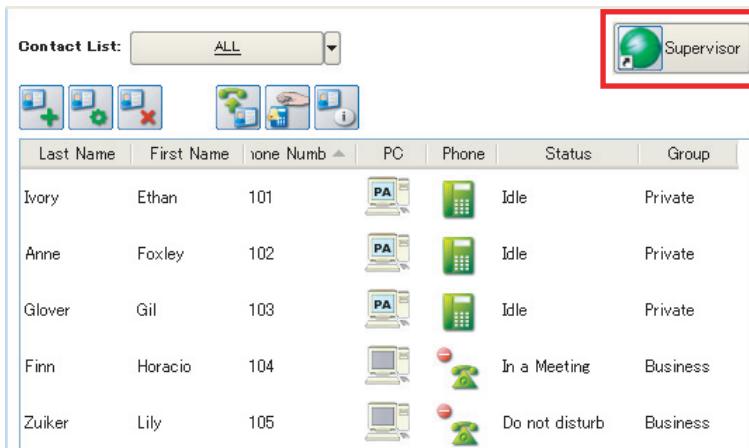
## ***Section 6***

### ***Supervisory Functions***

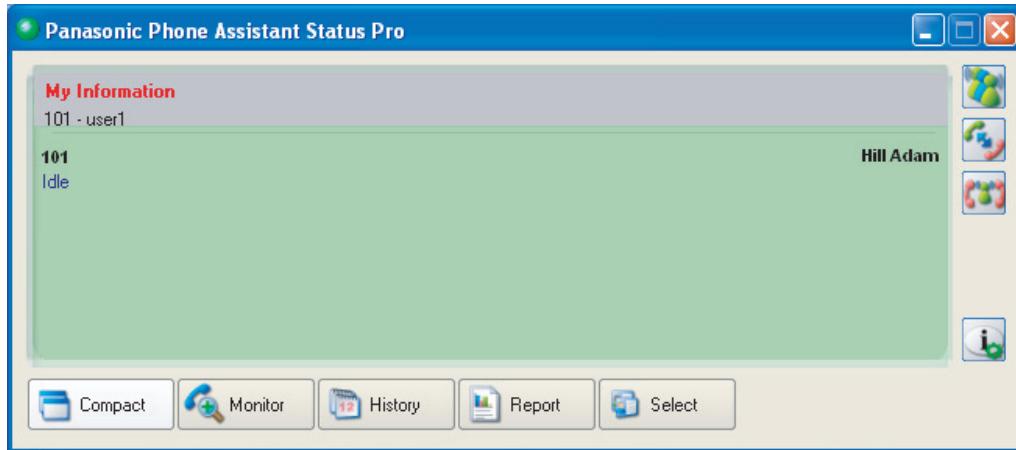
## 6.1 Opening the Supervisor Window

If you log in with a profile with supervisor privileges on PA Manager, you can use supervisor functions.

To open the supervisor Information Panel, click **Supervisor** on the **Contacts** tab.



The supervisor Information Panel will appear in **Compact** mode.

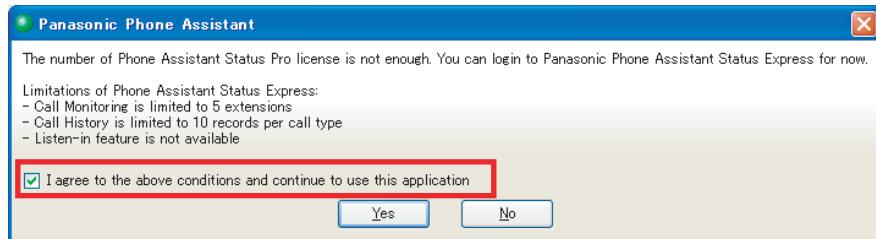


To exit the application, click the Close button.

### **Note**

The supervisor window is closed automatically when PA is closed.

In Pro mode, if the number of supervisors exceeds the number of supervisors allowed by your license, you may use the supervisor functions for Express mode. Up to 3 supervisors can use the application in Express mode.

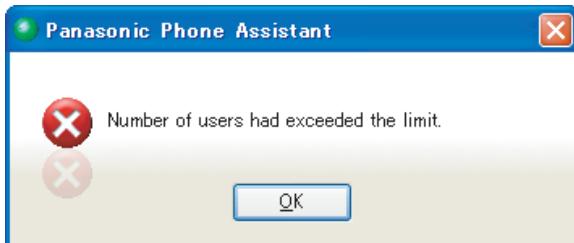


If you agree to the conditions stated above, select the check box and click **Yes** to use this function.

If supervisor privileges are revoked by the administrator after logging in to PA, the following message will appear when you open the supervisor window.



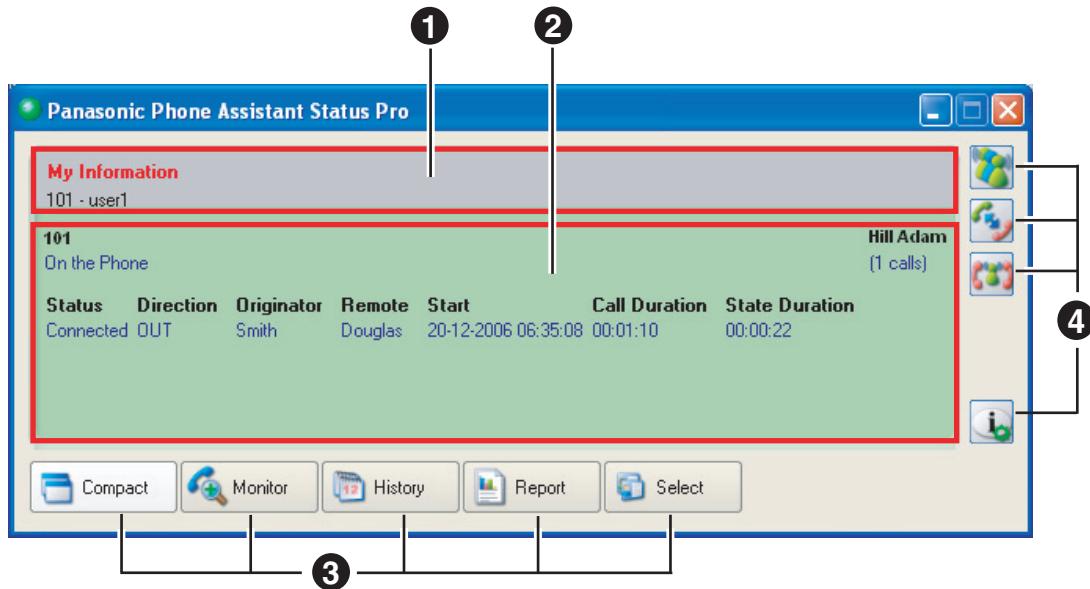
When the number of supervisors exceeds the user capacity for each mode, the following message will appear.



## 6.2 Information Panel

### Information Panel

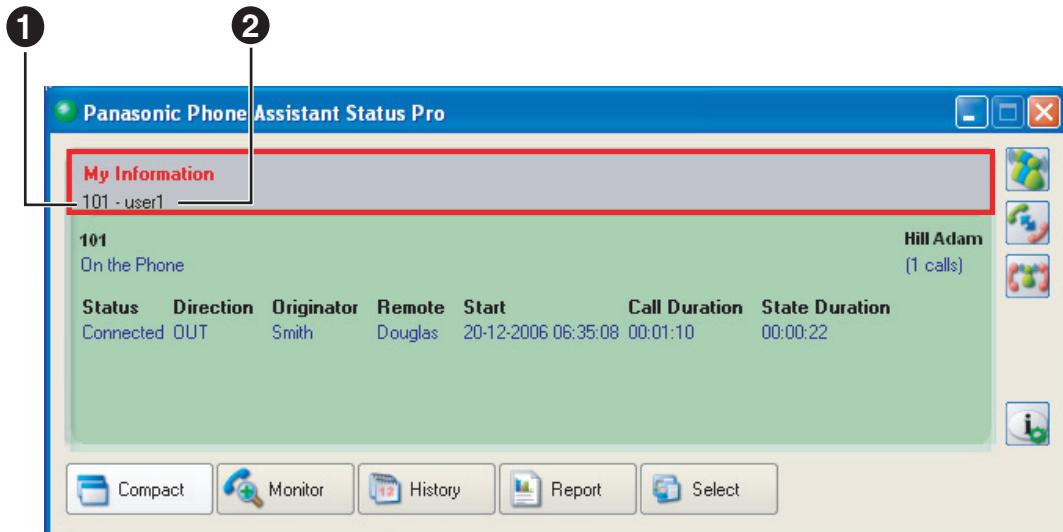
The Information Panel is the main interface where all of the most important information is found and where most features can be accessed.



The Information Panel is composed of the following:

- ① Information Field
- ② Specified Monitored Extension Information Field
- ③ Function Tabs
- ④ Control Buttons

### Information Field

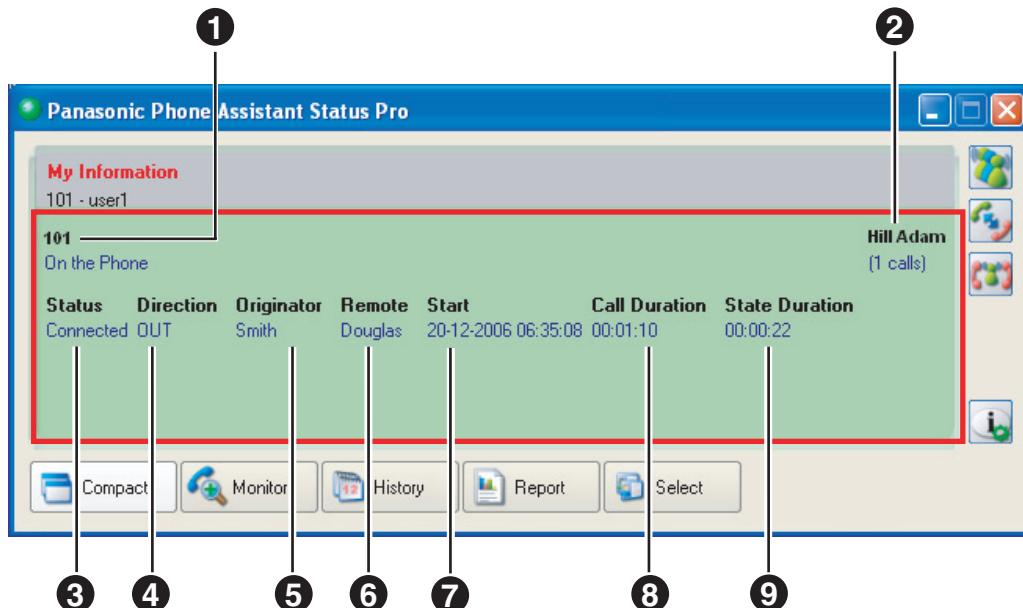


The following information related to the supervisor is displayed in this field:

- ① Extension Number
- ② User name

## Specified Monitored Extension Information

By selecting an extension in the monitor list, the following information (if available) about that extension will be displayed in the Information Panel.



- ① Extension Number
- ② User's full name

If the extension you are monitoring is not logged in to the PA application, "Unknown" is displayed.

### ③ Status

Shows the status of the call as follows:

- Incoming
- Ring back (with FWD/DND)
- Connected
- Hold
- Hold Pending Conference
- Hold Pending Transfer
- Conferenced
- Disconnected
- Dial tone
- On the Phone

### ④ Direction

Shows the original call state of the call as follows:

- Out: the call was originally made from this extension.
- In: the call was received to this extension.

### ⑤ Originator

Shows the extension name and/or number of the caller.

### ⑥ Remote

Shows the extension name and/or number of the called extension.

### ⑦ Start

Shows the start date and time of the current call. For instance, with a transfer, the start time is when the call was transferred and not the start time of the original call.

### ⑧ Call Duration

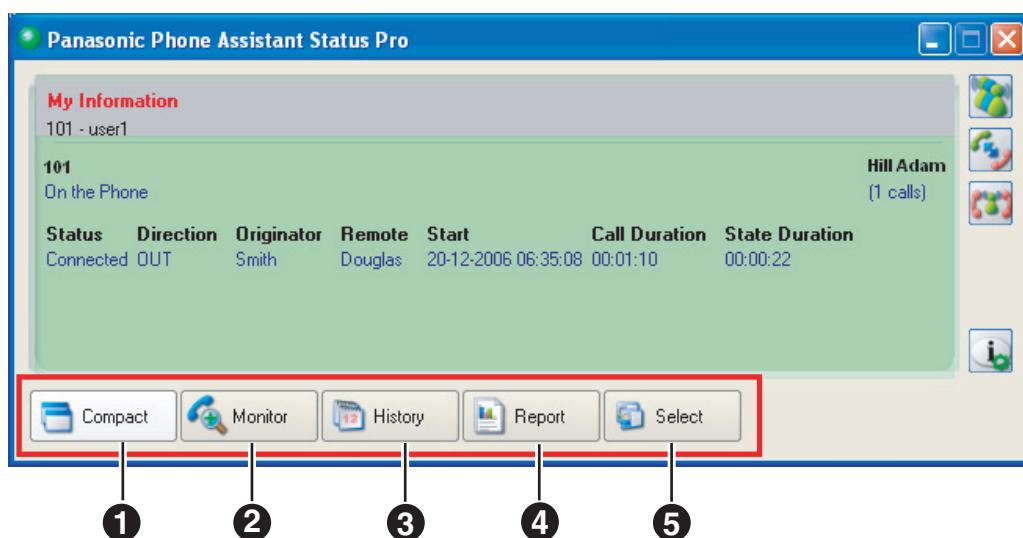
Shows the total duration of the call.

### ⑨ State Duration

Shows the duration of the current call state. If a call is transferred in any way to this extension, the timer starts when the extension user picks up the call.

## Function Tabs

By clicking the function tabs, the lower half of the Information Panel will open allowing the following functions to be used.



### ① Compact

Closes any tabs that are currently open.

### ② Monitor

Enables you to monitor all available extension users. A maximum of 128 users can be monitored. Please refer to 7.1.1 Extension Status Monitoring for details.

### ③ History

Enables you to view information regarding past calls made by monitored extension users. Please refer to 7.2 History Tab for details.

### ④ Report

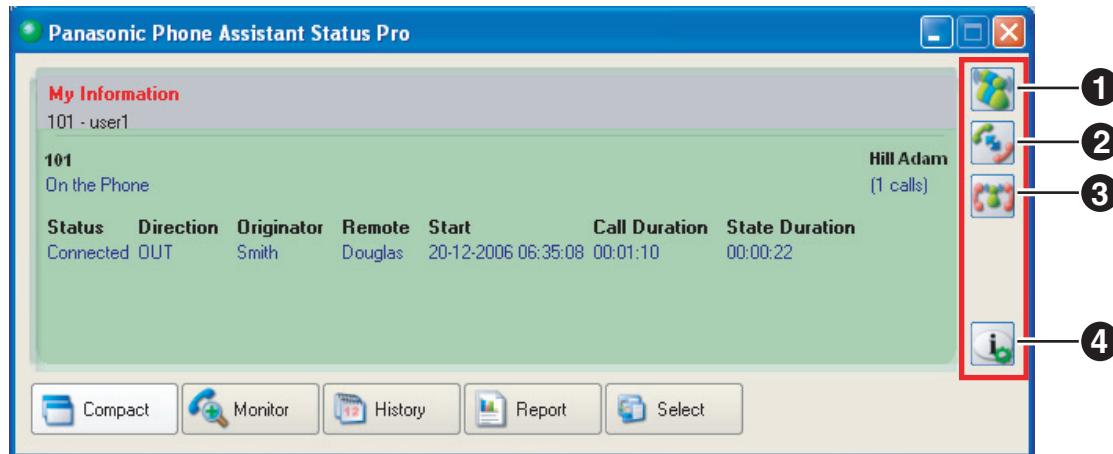
Enables you to view the current call information. Please refer to 7.3 Report Tab for details.

### ⑤ Select

Enables you to select which extensions to monitor. Please refer to 7.4 Select Tab for details.

## Control Buttons

The available control buttons are as follows:



- ① Barge In button  
Please refer to 8.1.1 Barge In Button for details.
- ② Take Over button  
Please refer to 8.1.2 Take Over Button for details.
- ③ Listen In button  
Please refer to 8.1.3 Listen In Button for details.
- ④ Option Settings button  
Please refer to 9.1 Option Settings for details.

## 6.2 Information Panel

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## **Section 7**

### ***Using the Tabs***

## 7.1 Monitor Tab

The **Monitor** tab gives an overview of the ongoing activities of the extension users specified in the **Select** tab. You can view the information explained in the sections below for each extension.

Extension	Extension Name	User name	Phone	Status
101	Keane	Finn Horacio (CTD)		Ringback
102	Grissom	Sidle Lily		Ringing
103	Jones			On the Phone
104	Robinson			In a Meeting
105	Cumberland			Do Not Disturb
106				Idle
107				Idle

It is possible to monitor all extensions (up to 128) in the phone directory by specifying so in the **Select** tab. The following types of devices can be monitored:

- Digital Proprietary Telephones (DPT)
- Analogue Proprietary Telephones (APT)
- Single Line Telephones (SLT)
- IP Proprietary Telephones (IP-PT)
- Portable Stations (PS)

### 7.1.1 Extension Status Monitoring

Depending on the type of call the following information will be displayed.

- **Extension**  
The extension number registered in the PA Manager application.
- **Extension Name**  
The extension name registered in the PBX.
- **User name**  
The full name of the PA user.
- **Department**  
The department name registered in the PA Manager application is displayed under the PA user name.
- **Phone type and Status**  
The following device state icons will be displayed.

Phone Type				Status
DPT/APT	SLT	IP-PT	PS	
				Extension is Idle.
				Extension is Ringing.
				Extension is On the Phone.
				Absent Message/DND is set.

- Phone Presence Setting  
If the extension has been set to DND, "Do Not Disturb" is shown.
- Absent Message Setting  
If the extension has set an Absent Message, the specified message is shown (e.g., Gone Home).

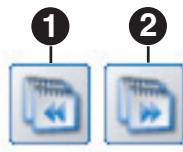
## 7.2 History Tab

All incoming and outgoing calls for the monitored extensions (maximum of 128) can be displayed in the **History** tab.

Type	Caller	Called	Date Time	Duration	Ringing Time	Trunk	Tag
	101 (Keane)	103 (Jones)	2006-04-18 02:42:53	00:00:27	00:00:03	Internal	
	101 (Keane)	102 (Grissom)	2006-04-18 02:43:04	00:00:06	00:00:06	Internal	
	Conference	Conference	2006-04-18 02:43:04	00:00:06	00:00:00	Internal	
	101 (Keane)	103 (Jones)	2006-04-18 02:46:39	00:00:19	00:00:05	Internal	
	101 (Keane)	102 (Grissom)	2006-04-18 02:46:54	00:00:03	00:00:03	Internal	
	103 (Jones)	101 (Keane)	2006-04-18 02:49:58	00:01:36	00:00:05	Internal	

### 7.2.1 Display of Call Information

It is possible to view the history of past calls depending on the call type (e.g., incoming missed calls, outgoing unanswered calls, etc.) by using the Call Type buttons. Up to 100 records per page can be displayed for each call type.



**1 Previous** button

**2 Next** button

Click **Next** to view the next page, and click **Previous** to view the previous page.

#### **Note**

- When an external incoming call is transferred from an extension/Voice Processing System (VPS), the incoming call is recorded twice on the receiving extension's call log: once for the external incoming call log, and once for the intercom call from the extension/VPS.
- When an extension receives a blind-transfer call, the call from the transferring extension will be recorded as a missed call on the receiving extension's call log.

### Call Type Button

The following buttons can be used to change the type of calls that are displayed in the **History** tab.

Button	Type of Call
	Show All Calls
	Show Incoming Missed Calls
	Show Incoming Received Calls
	Show Outgoing Unanswered Calls
	Show Outgoing Answered Calls
	All monitored extensions/specific extension

### 7.2.1 Display of Call Information

The All monitored extensions/specific extension button allows you to switch between viewing call histories for all extensions and the call histories for specific extensions.



All monitored extensions/specific extension button

- All monitored extensions  
The call history of all monitored extensions will be displayed.

Type	Caller	Called	Date Time	Duration	Ringing Time	Trunk	Tag
	101 (Keane)	102 (Grissom)	2006-04-19 03:09:15	00:00:04	00:00:04	Internal	
	103 (Jones)	101 (Keane)	2006-04-19 03:09:21	00:00:22	00:00:03	Internal	
	103 (Jones)	101 (Keane)	2006-04-19 03:09:24	00:00:20	00:00:03	Internal	
	102 (Grissom)	103 (Jones)	2006-04-19 04:14:52	00:00:15	00:00:08	Internal	
	102 (Grissom)	101 (Keane)	2006-04-19 04:14:54	00:00:03	00:00:03	Internal	
	102 (Grissom)	103 (Jones)	2006-04-19 04:14:57	00:00:10	00:00:05	Internal	

- Selected extension  
The call history of the extension highlighted in the **Monitor** tab will be displayed.

Type	Caller	Called	Date Time	Duration	Ringing Time	Trunk	Tag
	101 (Keane)	103 (Jones)	2006-04-18 02:42:53	00:00:27	00:00:03	Internal	
	101 (Keane)	102 (Grissom)	2006-04-18 02:43:04	00:00:06	00:00:06	Internal	
	Conference	Conference	2006-04-18 02:43:04	00:00:06	00:00:00	Internal	
	101 (Keane)	103 (Jones)	2006-04-18 02:46:39	00:00:19	00:00:05	Internal	
	101 (Keane)	102 (Grissom)	2006-04-18 02:46:54	00:00:03	00:00:03	Internal	
	103 (Jones)	101 (Keane)	2006-04-18 02:49:58	00:01:36	00:00:05	Internal	

## Call History Information

- Type
  - Incoming Missed Calls
  - Incoming Received Calls
  - Outgoing Unanswered Calls
  - Outgoing Answered Calls

## 7.2.1 Display of Call Information

- Caller
- Caller Name
- Called
- Called Name
- Date/Time of the call
- Duration of the call (h: min: s)
- Ringing time (Ringing duration) (h: min: s)
- Trunk
- Tag

## Sorting/Column Moving Possibilities

It is possible to:

- Sort history items according to each column heading. This is performed by clicking the desired column header.
- Change the order of the columns displayed. This is performed by selecting and dragging a column header to the desired location.

## Searching

Call History items can be searched using the values (e.g., 102, Chris Martin) for the following topics:

- Caller
- Called
- Caller Name
- Called Name

Searched items will be listed in the following priority:

Caller → Called → Caller Name → Called Name

Call History - (All Calls) - All monitored extensions							
Type	Caller	Called	Date Time	Duration	Ringing Time	Trunk	Tag
	103 (Jones)	102 (Grissom)	2006-04-19 05:29:26	00:01:04	00:00:02	Internal	
	101 (Keane)	102 (Grissom)	2006-04-19 05:29:35	00:00:31	00:00:00	Internal	
	Conference	Conference	2006-04-19 05:29:36	00:00:29	00:00:00	Internal	
	101 (Keane)	102 (Grissom)	2006-04-19 05:29:36	00:00:29	00:00:00	Internal	
	101 (Keane)	102 (Grissom)	2006-04-19 05:30:11	00:00:10	00:00:00	Internal	
	103 (Jones)	101 (Keane)	2006-04-19 05:30:43	00:00:31	00:00:16	Internal	

Search

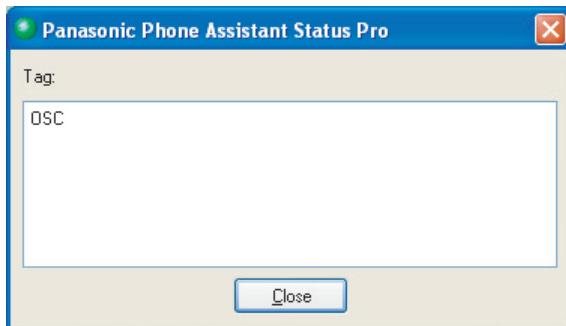
## Viewing a Call Tag

It is possible to view the call tag information assigned by PA users in the **History** tab.

1. Right-click the call history item with a call tag, and select **View Call Tag**.

Type	Caller	Called	Date Time	Duration	Ringing Time	Trunk	Tag
	103 (Jones)	101 (Keane)	2006-04-18 04:00:20	00:00:36	00:00:01	Internal	
	101 (Keane)	102 (Grissom)	2006-04-18 05:11:53	00:00:15	00:00:02	Internal	OSC
	103 (Jones)	101 (Keane)	2006-04-18 22:54:51	00:00:01	00:00:00	Internal	

The tag information screen will appear.



## Calling a Party in the Call History from Your Extension

It is possible to make a call by double-clicking or right-clicking the call history item and selecting Redial.

- When the call history for your own extension is highlighted, you can make a call to the party regardless of whether the history is an incoming or an outgoing call.
- When the call history for another extension is highlighted, redial is performed based on Caller.

Type	Caller	Called	Date Time	Duration	Ringing Time	Trunk	Tag
	101 (Keane)	104 (Robinson)		00:00:10	00:00:10	Internal	
	103 (Jones)	101 (Keane)	2006-04-18 03:56:59	00:00:32	00:00:02	Internal	

It is possible to redial the following types of calls:

- Incoming Missed Calls
- Incoming Received Calls
- Outgoing Unanswered Calls
- Outgoing Answered Calls

## 7.2.2 CSV Output

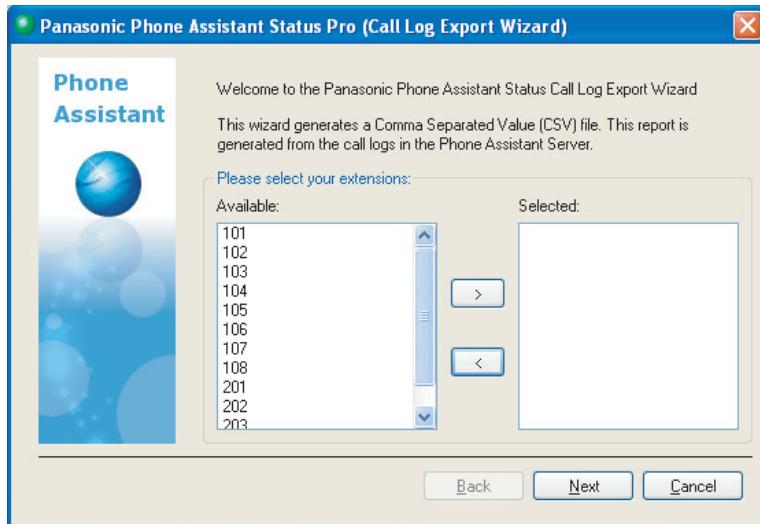
The Call Log Report button allows you to save call log history data as a CSV (comma-separated values) formatted file.



Call Log report button

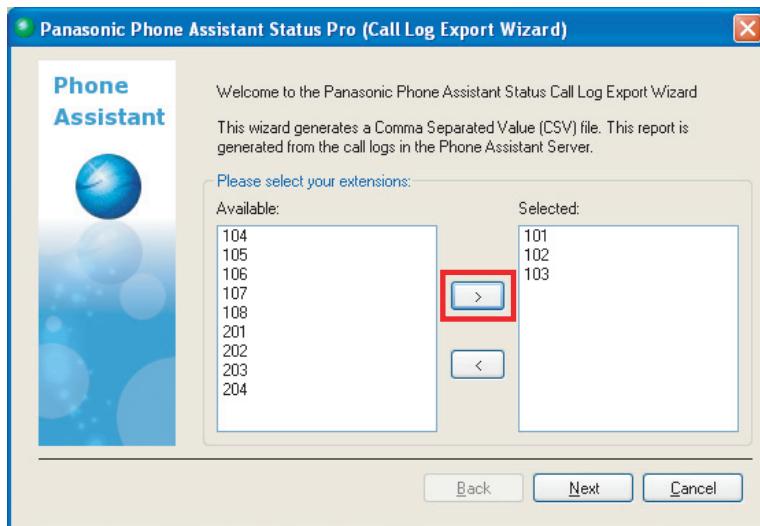
## 7.2.2 CSV Output

1. Click the Call Log Report button.



The Call Log Export Wizard screen will be displayed.

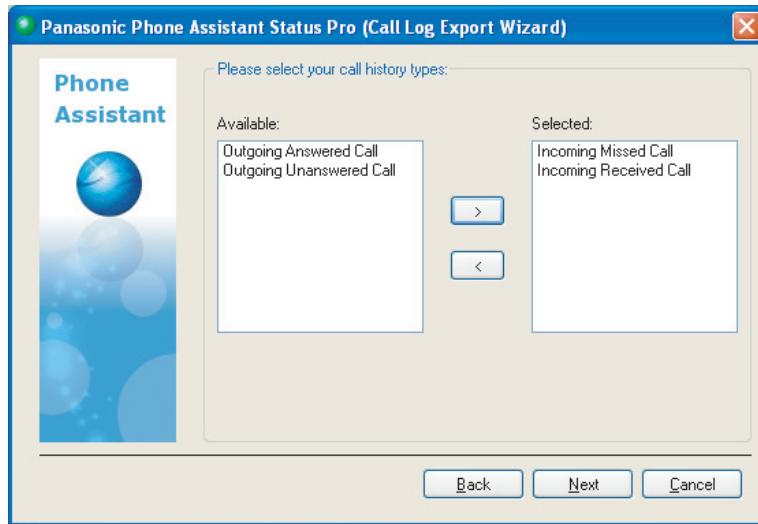
2. Select the desired extensions in the **Available** field and click the right arrow button to move them to the **Selected** field.



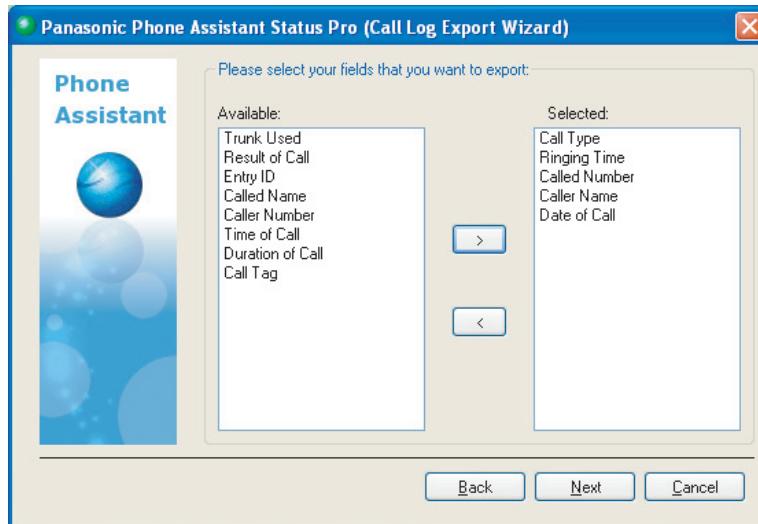
It is possible to move selected extensions back to the **Available** field by clicking the left arrow button.

3. Click **Next** to proceed.

4. Select the desired call history types in the **Available** field and click the right arrow button to move them to the **Selected** field.



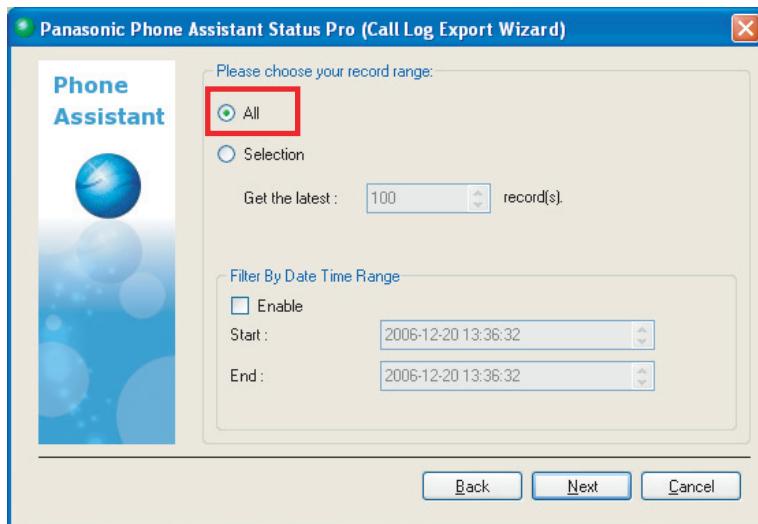
5. Click **Next** to proceed.
6. Select the call information types to export in the **Available** field and click the right arrow button to move them to the **Selected** field.



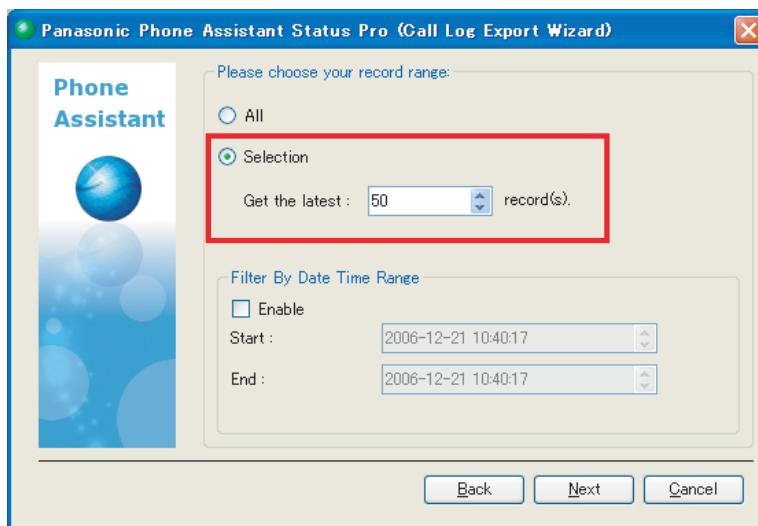
7. Click **Next** to proceed.
8. In the record range screen, you are provided with 2 types of the record range to be exported.

## 7.2.2 CSV Output

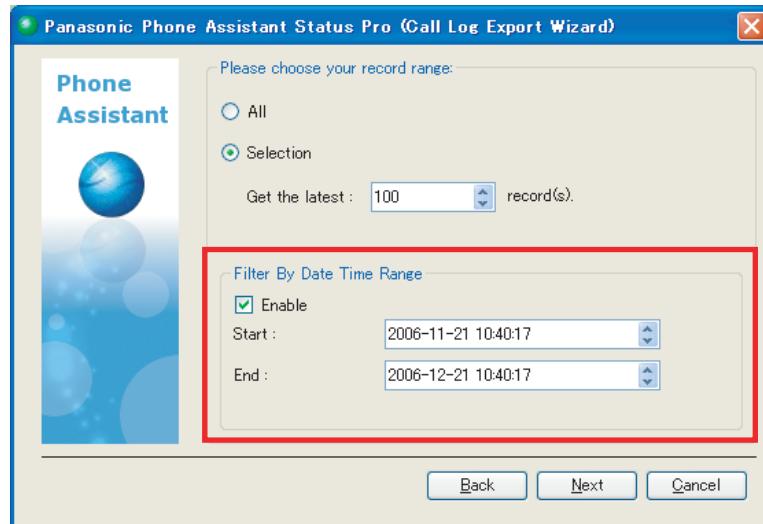
- If **All** is selected, all records matching the selected criteria are exported.



- If **Selection** is selected, the most recent records, where the number input into the **Selection** field, are exported (e.g., the latest 100 records).

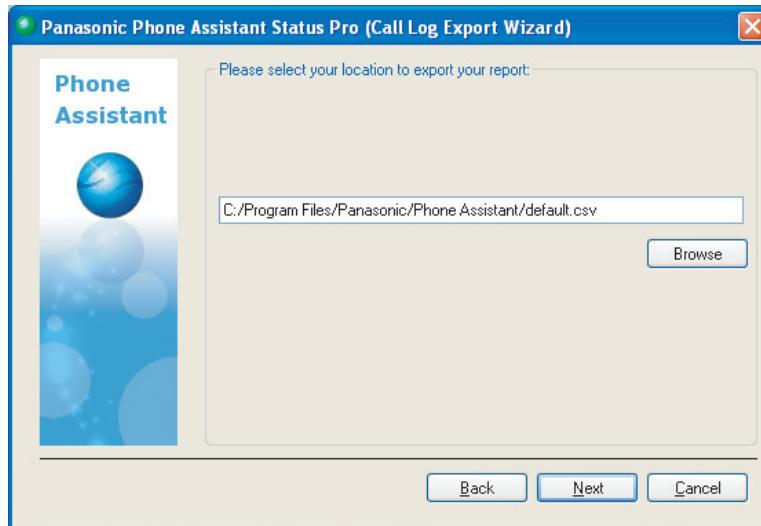


- If the Date Time Range field is selected, matching records are filtered by the specified start and end date/time (the format of the date/time: yyyy mm dd h:min:s).



9. Click **Next** to proceed.

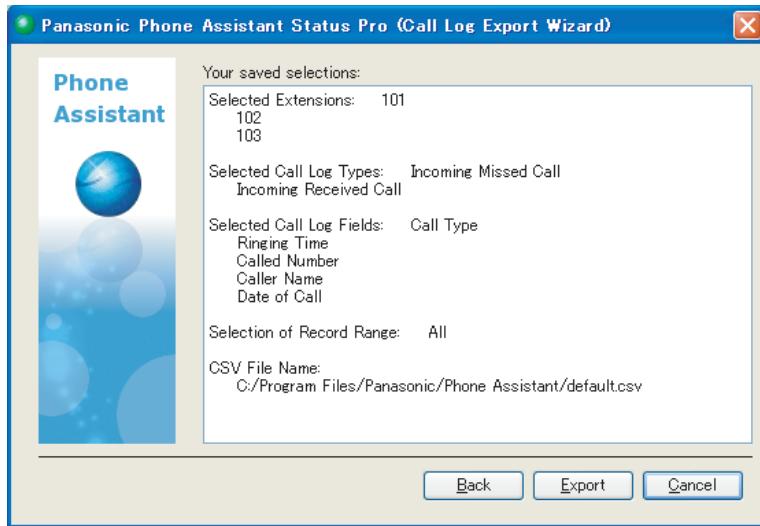
10. Select the location to export the report. You can select a location by clicking **Browse**.



11. Click **Next** to proceed.

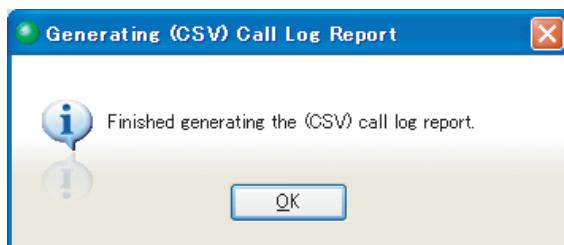
## 7.2.2 CSV Output

12. The selected contents will be displayed. Click **Export** to generate the CSV report.



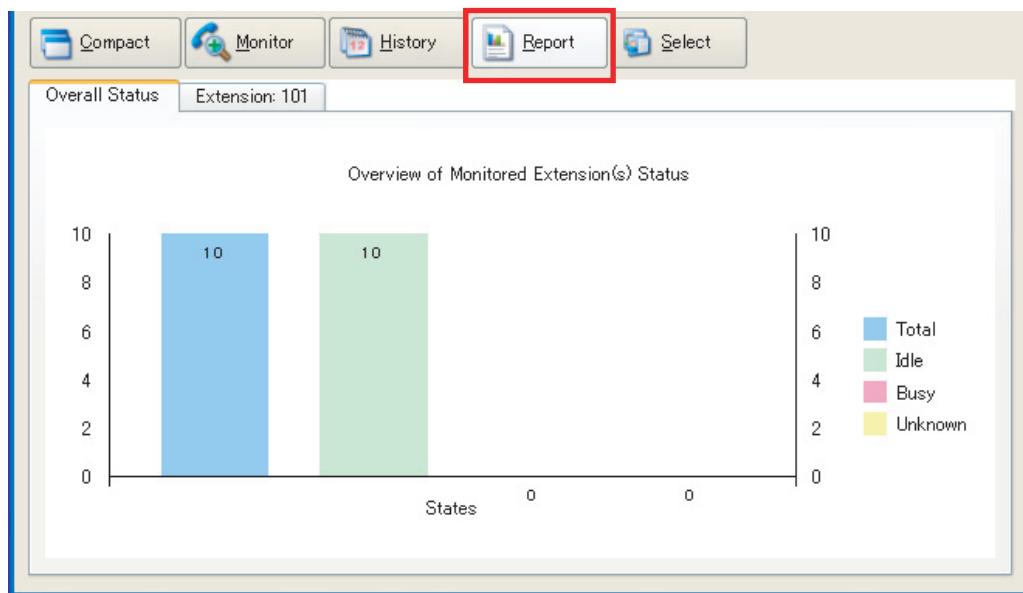
You can go back to the previous screen by clicking **Back** or abort this operation by clicking **Cancel**.

13. The following dialog box will appear when the export is complete. Click **OK**.



## 7.3 Report Tab

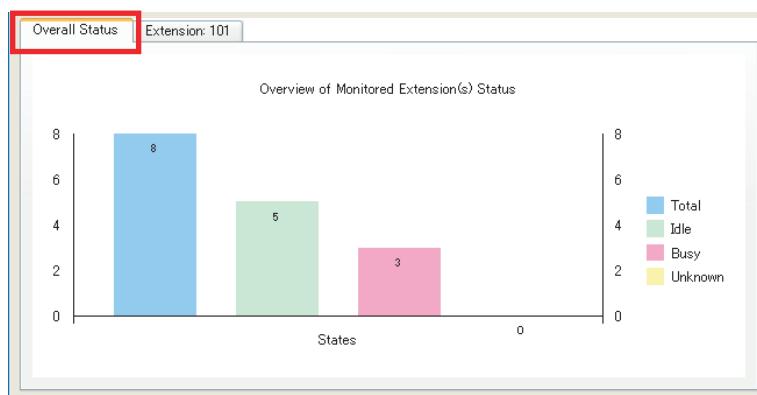
By clicking the **Report** tab, you can view the current call information and call statistics of the specified extension.



### 7.3.1 Overall Status Reporting

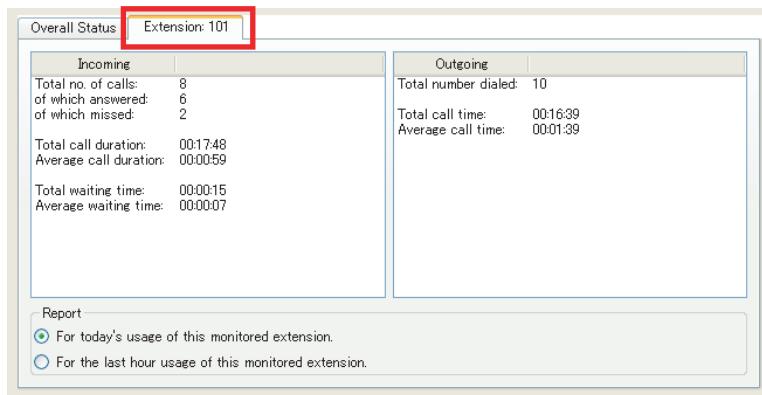
The following information is displayed in the **Overall Status** tab.

- Total: Total number of monitored extensions
- Idle: Total number of monitored extensions with the device state **Idle**
- Busy: Total number of monitored extensions with all device states except **Idle**
- Unknown



## 7.3.2 Extension Reporting

In the **Extension** tab, the general call statistics for a monitored extension in the **Monitor** tab is displayed.



It is possible to limit the data displayed to the 2 following time criteria:

- The last hour
- The current day (from 00:00 up to the current time)



The following information is displayed in the **Extension** tab.

### Incoming field

- Total number of incoming calls
- Total number of answered calls
- Total number of missed calls
- Total call time
- Average call time
- Total waiting time (ringing time)
- Average waiting time

### Outgoing field

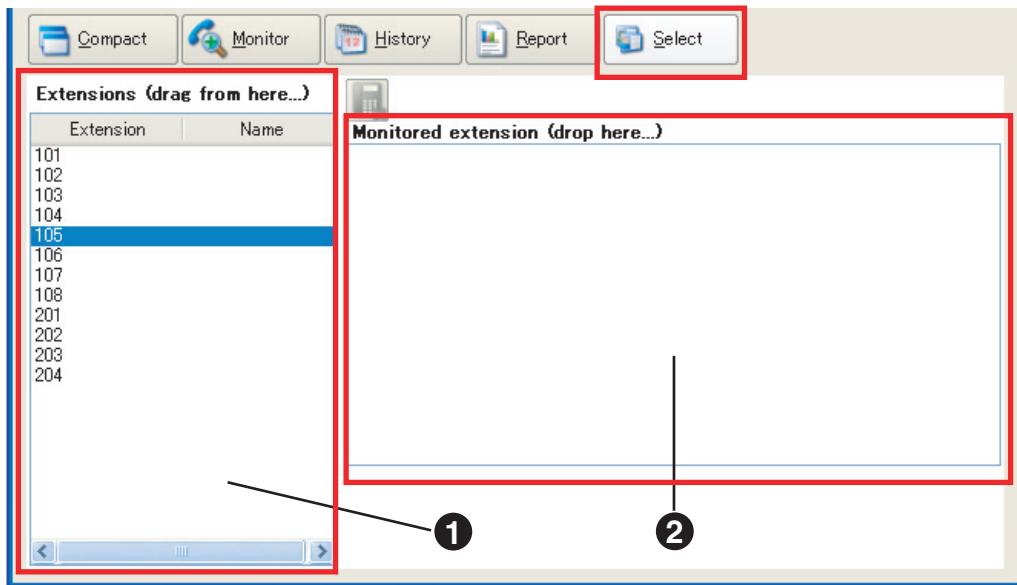
- Total number of dialed calls
- Total call time
- Average call time

### Note

- When an external incoming call is transferred from an extension/Voice Processing System (VPS), the incoming call is recorded twice on the receiving extension's call log: once for the external incoming call log, and once for the intercom call from the extension/VPS.
- When an extension receives a blind-transfer call, the call from the transferring extension will be recorded as a missed call on the receiving extension's call log.

## 7.4 Select Tab

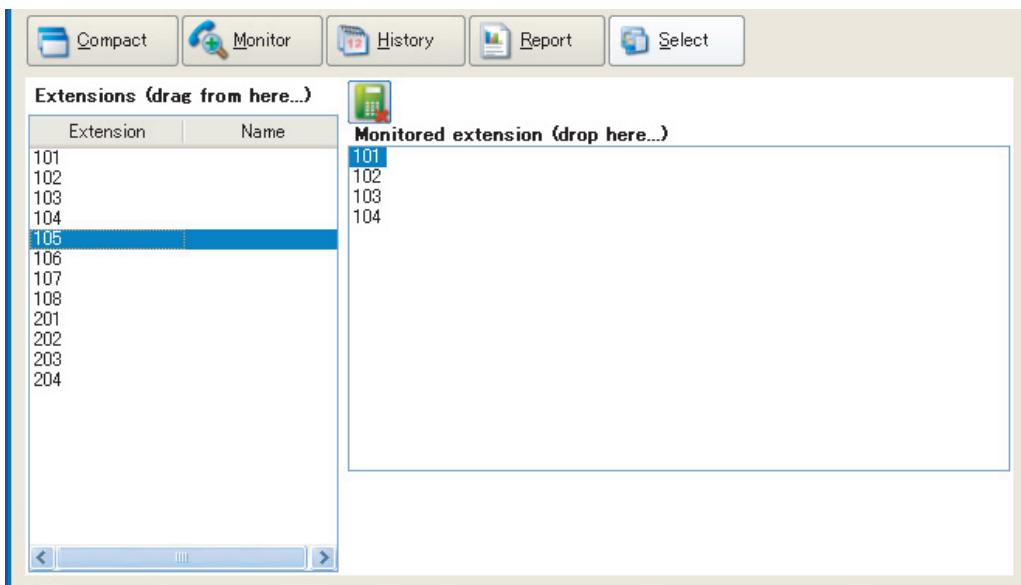
It is possible to specify which items to monitor with the **Monitor** tab. The **Extensions** panel in the **Select** tab shows all the extensions available in the system, and the **Monitored extension** panel indicates the selected extensions to be monitored.



- ① Extensions panel
- ② Monitored extension panel

### Specifying which Extensions will be Monitored

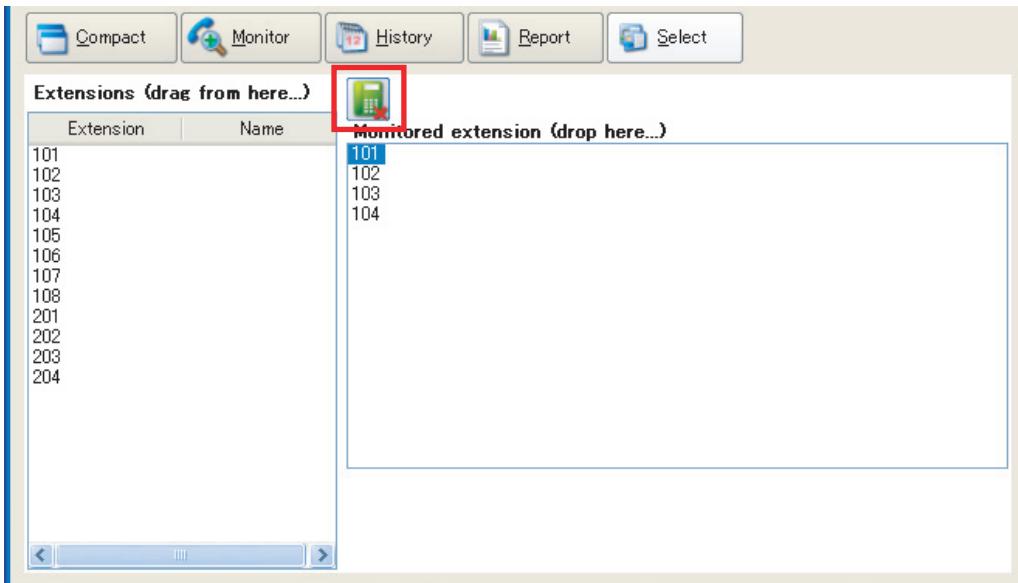
To add an extension to be monitored, drag an extension from the **Extensions** panel and drop into the **Monitored extension** panel.



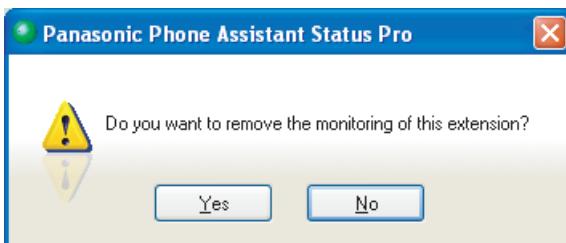
### Removing an Extension from the Monitor Tab

A selected extension can be removed from the **Monitored extension** panel using the Remove Monitored Extension button.

1. Select the extension to be removed in the **Monitored extension** panel.
2. Click the Remove Monitored Extension button.



3. A confirmation dialog box will appear before removing the selected extension.



4. Click **Yes** to remove the selected extension or **No** to cancel the action.

When an extension is removed, the corresponding details will be removed from the **Monitor** tab.

---

## ***Section 8***

### ***Operation with Buttons***

## 8.1 Control Functions

A supervisor can take control of an ongoing call being handled by PA users.

The following are the call control functions that can be performed:

- Barge In
- Take Over (on an ongoing call)
- Listen In (on a conversation)

### IMPORTANT

Please refer to the Panasonic Hybrid IP-PBX manuals for details about the PBX settings in order to use the supervisor functions.

### 8.1.1 Barge In Button

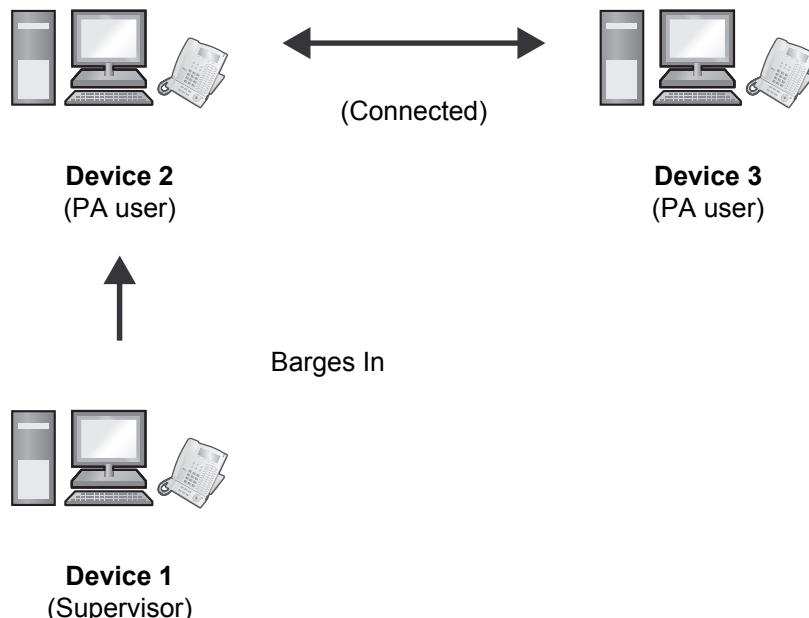
This function allows the supervisor to enter into an existing call, therefore creating a three-party conference call.



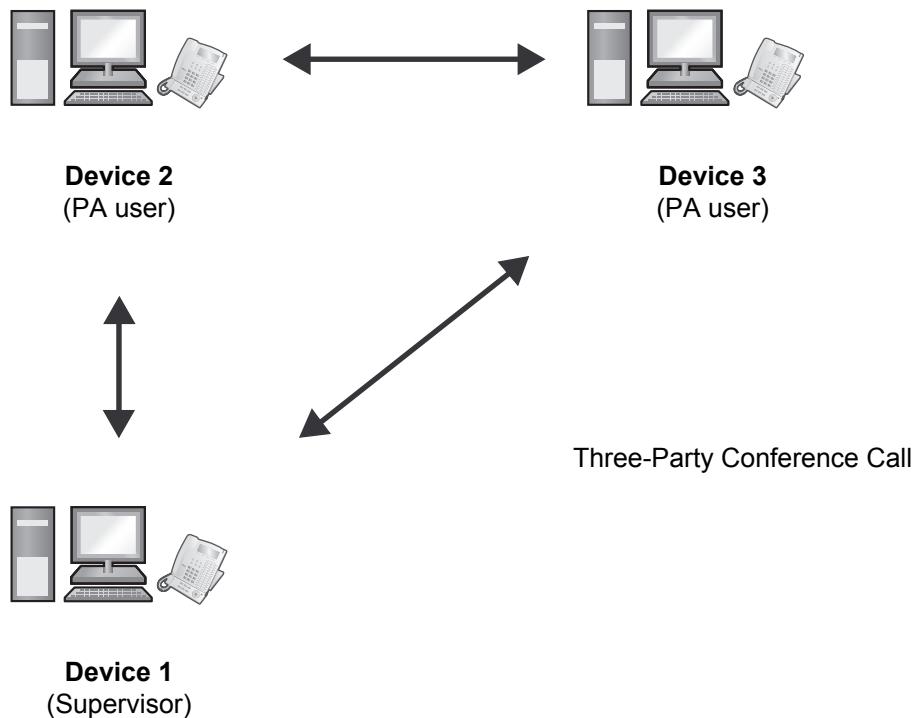
Barge In button

#### Example

1. Device 2 and device 3 are on a call. Device 1 (supervisor) selects device 2 in the **Monitor** tab and presses the Barge In button.



2. Device 1 interrupts the connected call between device 2 and device 3 to make a three-party conference call.



**Note**

During the conversation, if any of the parties hangs up the conference will end, however the remaining two parties can continue talking.

## Conditions

Barge In can only be executed under the conditions noted below.

**PBX settings:**

- Executive Busy Override in COS settings is enabled.

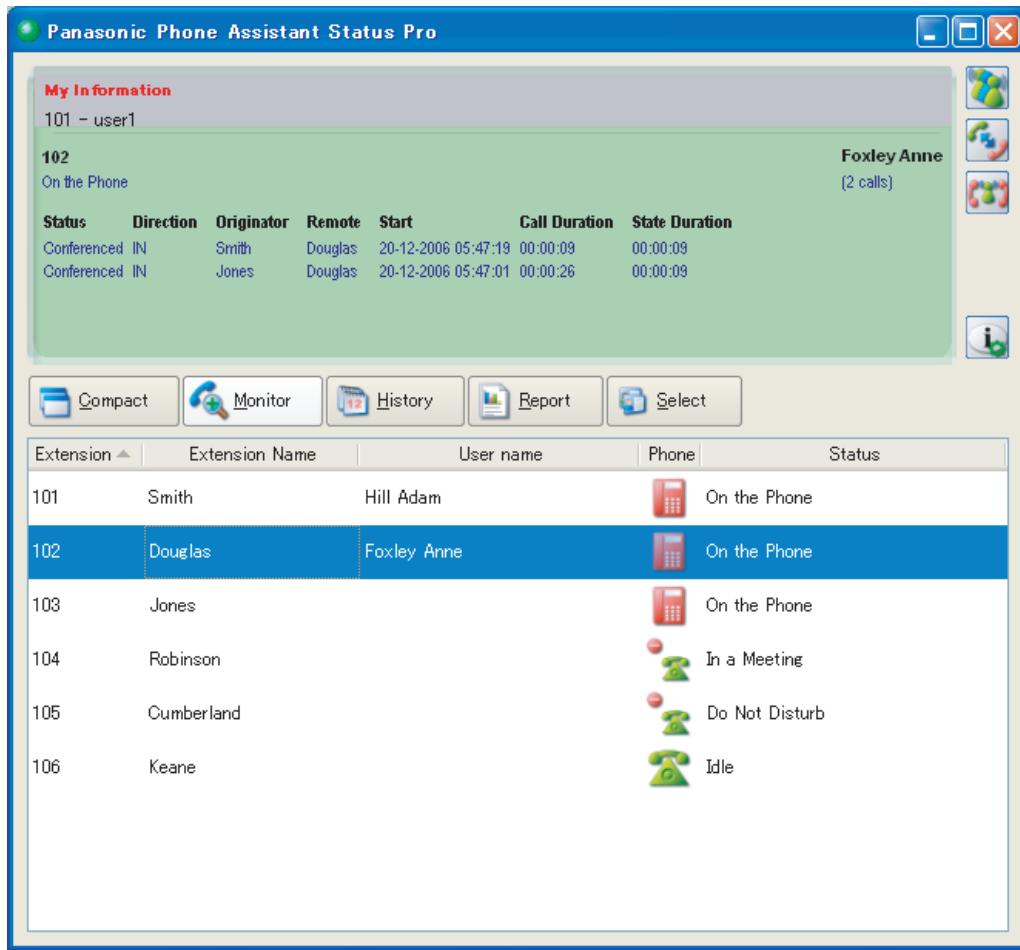
**Call specific conditions:**

The supervisor cannot barge in when there is an ongoing call (internal or external) between 2 parties with the following conditions:

- The monitored extension is currently connected to the supervisor.
- The supervisor's own extension is busy.
- The selected call is a part of a conference call.
- There is consultation hold on one of the involved extensions.
- The call is already being monitored by another extension.
- The call is a door phone call.

### 8.1.2 Take Over Button

When the desired call has been barged in, the following information is displayed:



### Conditions for PSs

Barge In for Portable Station (PS) calls is possible when the supervisor extension is a DPT extension. The PA application does not support PS (DECT) telephones. It is impossible for users to use the software with only PS (DECT) telephones.

### 8.1.2 Take Over Button

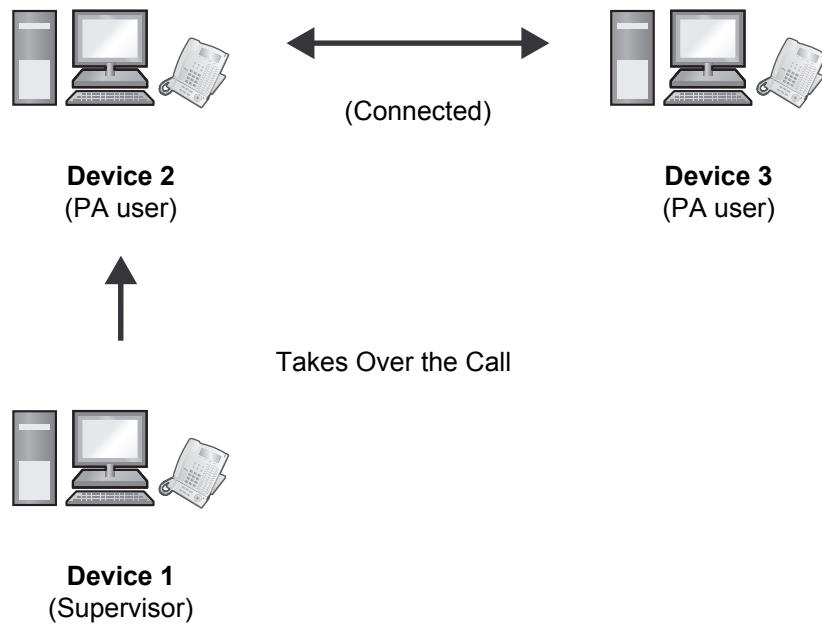
This function allows the supervisor to take over an ongoing two-party call, by selecting an extension on an ongoing call and pressing the Take Over button. The target extension is disconnected from the call.



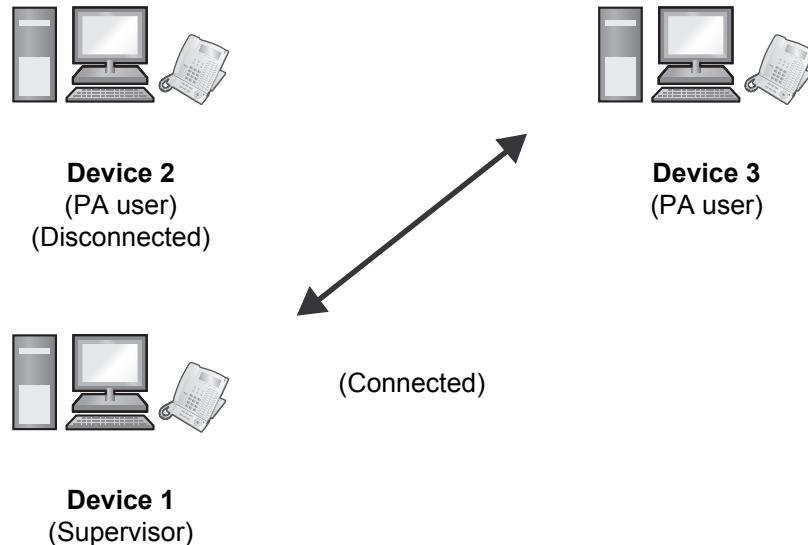
Take Over button

## Example

1. Device 2 and device 3 are on a call. Device 1 (Supervisor) selects device 2 in the **Monitor** tab and presses the Take Over button.



2. Device 1 takes over the ongoing call to connect with device 3. Device 2 is disconnected.



## Conditions

### Call specific conditions:

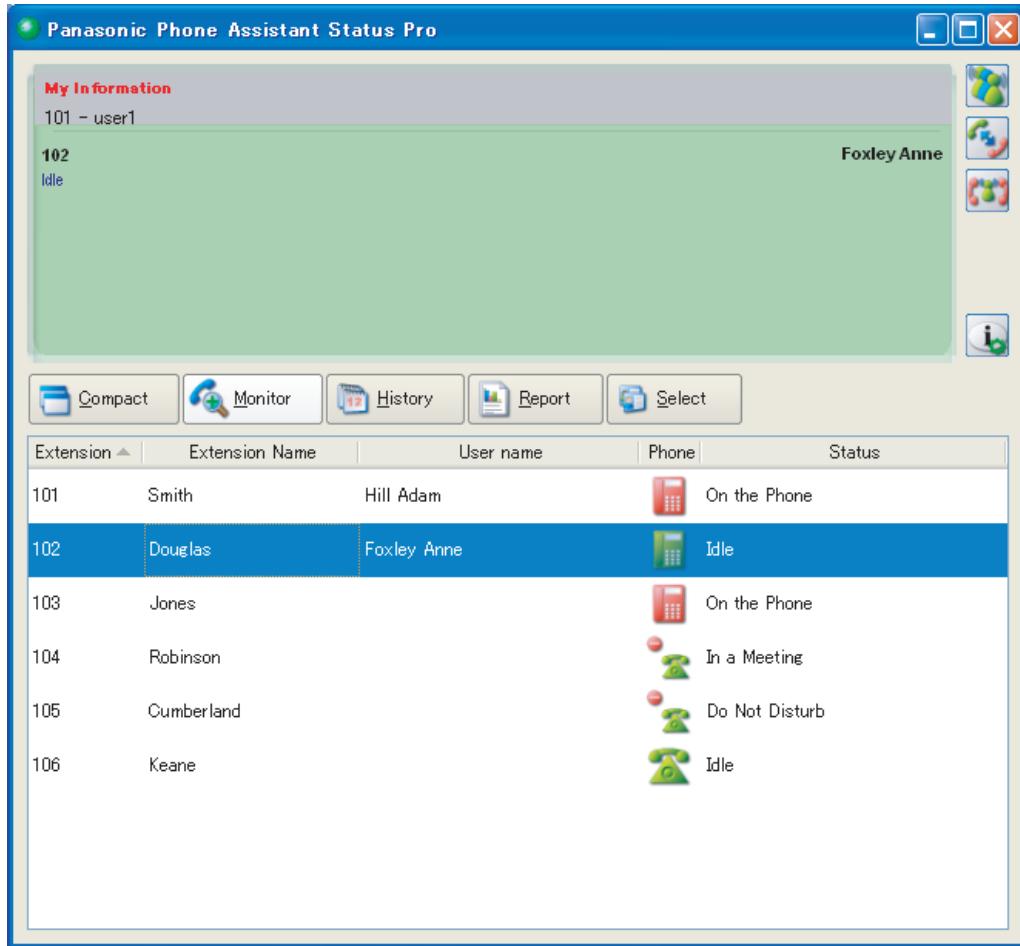
The supervisor cannot take over the call when there is an ongoing call (internal or external) between 2 parties with the following conditions:

- The monitored extension is currently connected to the supervisor.
- The supervisor's own extension is busy.
- The selected call is a part of a conference call.

### 8.1.3 Listen In Button

- There is consultation hold on one of the involved extensions.
- The call is already being monitored by another extension.
- The call is a door phone call.

If the supervisor has successfully taken over a conversation, the following information is displayed:



### Conditions for PSs

It is impossible for a Portable Station (PS) extension to take over a call. The PA application does not support PS (DECT) telephones.

### 8.1.3 Listen In Button

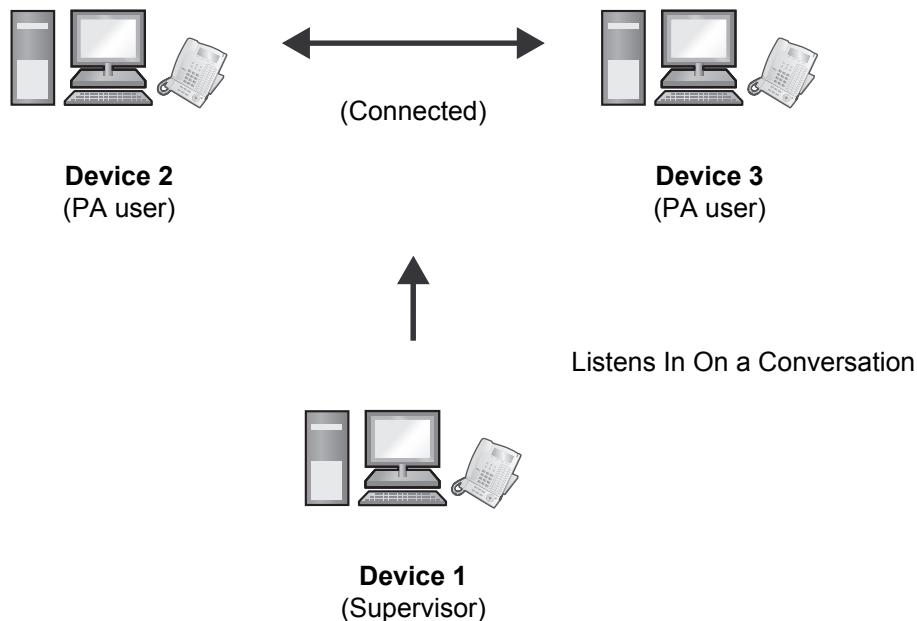
This function allows the supervisor to listen in on an ongoing conversation of a monitored extension. The supervisor's voice cannot be heard.



Listen In button

## Example

1. Device 2 and device 3 are on a call. Device 1 (supervisor) selects device 2 in the **Monitor** tab and presses the Listen In button. Device 1 listens in on an ongoing conversation between device 2 and device 3.



### Note

The supervisor can stop listening in on a conversation by right-clicking the monitored extension and selecting hangup.

## Conditions

Listen In can only be executed under the conditions noted below.

### PBX settings:

- Call Monitor in COS settings is enabled.

### Call specific conditions:

The supervisor cannot listen in on a conversation when there is an ongoing call (internal or external) between 2 parties with the following conditions:

- The monitored extension is currently connected to the supervisor.
- The supervisor's own extension is busy.
- The selected call is a part of a conference call.
- There is consultation hold on one of the involved extensions.
- The call is already being monitored by another extension.
- The call is a door phone call.

## Conditions for PSs

Listen In for Portable Station (PS) calls is possible when the supervisor extension is a DPT extension. The PA application does not support PS (DECT) telephones. It is impossible for users to use the software with only PS (DECT) telephones.

### 8.1.3 Listen In Button

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---

## ***Section 9***

# ***Configurations***

## 9.1 Option Settings

Options Settings is the configuration page for supervisor. The following information can be set:

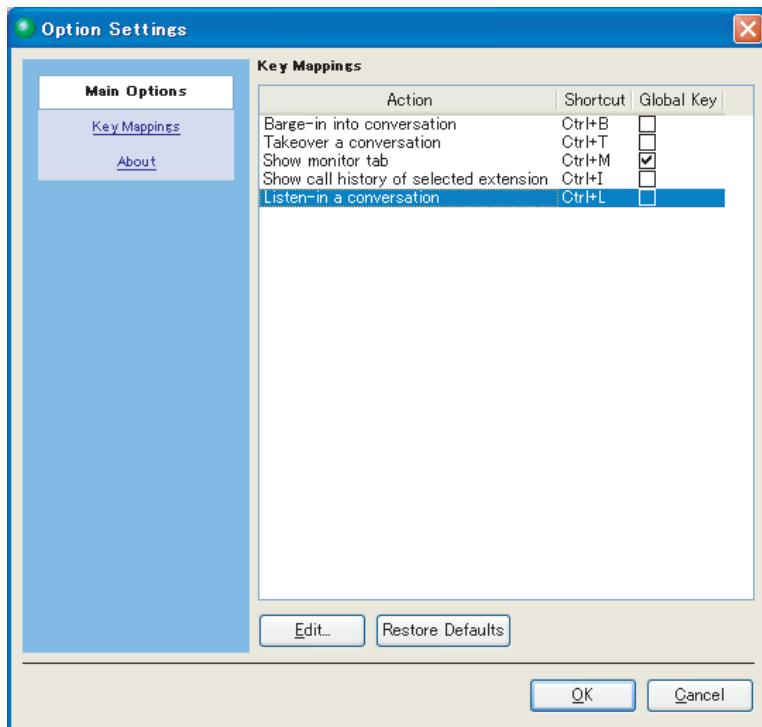
- Key Mappings
- About



Option Settings button

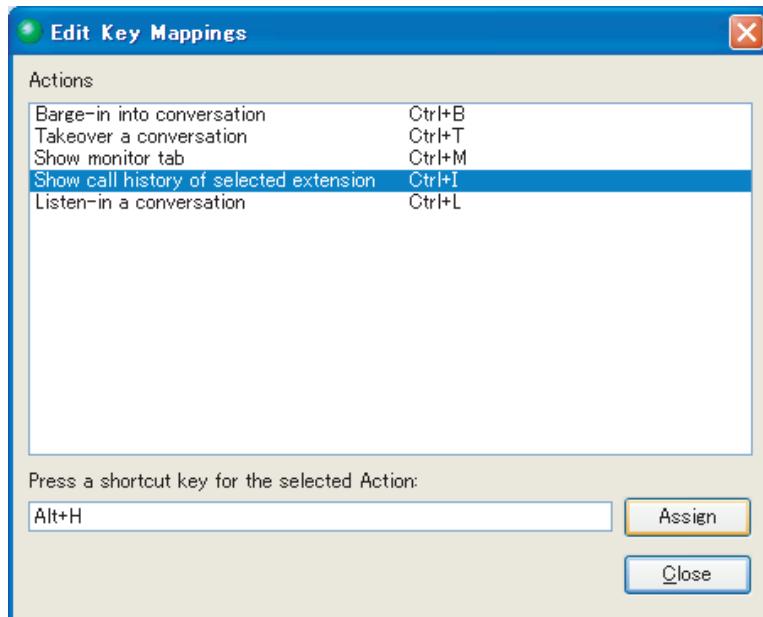
### 9.1.1 Key Mappings

This screen allows you to enable shortcuts for the functions shown below.



### Editing shortcut settings

It is possible to edit shortcuts by clicking **Edit....** The following window will appear.



1. Select an Action.
2. Place the cursor in the shortcut key input field.
3. Press the desired shortcut key for the selected Action (e.g., CTRL+P, ALT+E, etc.).
4. Click **Assign** to change the setting.

Clicking **Restore Defaults** returns the shortcuts to their default settings.

#### Global Key check box

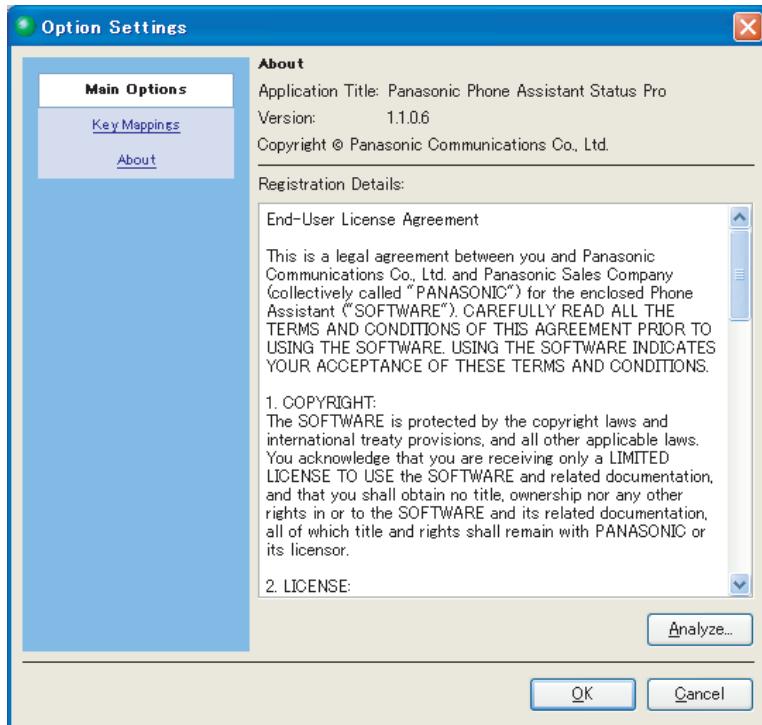
If the **Global Key** check box is selected, you can operate PA functions by using PA application shortcut keys even if other applications are active.

## 9.1.2 About

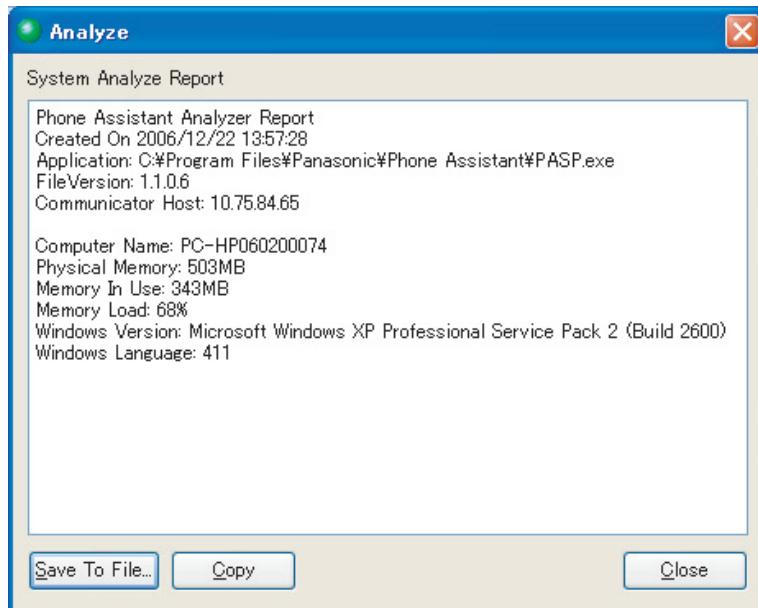
The About screen shows the following summary:

- Application Title
- Software Version
- Copyright Information
- Registration Details

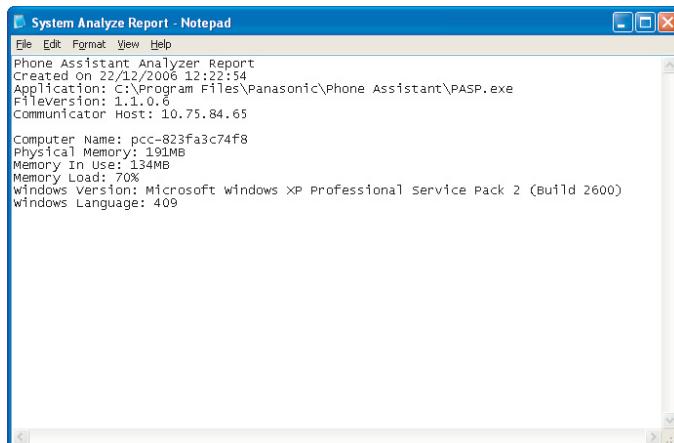
Clicking **Analyze...** will generate a System Analyze Report which can be copied to the clipboard or saved as a file.



Click **Save To File...** to specify the desired location to save the System Analyze Report.



An example of the system information is shown below.



### 9.1.2 About

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## ***Section 10***

### ***Phone Assistant Softphone Plug-in Module***

## 10.1 Using the Softphone

### **IMPORTANT**

To use the Softphone function, a Phone Assistant IP Softphone Module license needs to be registered.

You can operate the Phone Assistant application on the computer using the headset.

To log in to the application:

1. Double-click the shortcut on your desktop, or start the Phone Assistant from the Start menu:  
**Start → All Programs → Panasonic → Phone Assistant → Phone Assistant**

### **Note**

The folder names may be different from the path listed above if a different path was entered during the installation process. The above path is the default path.

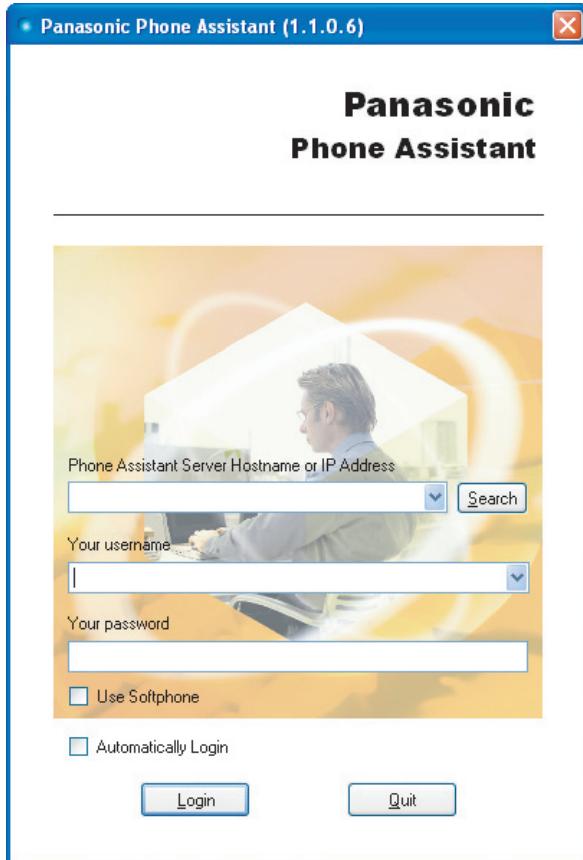


2. Enter the server host name or the IP address.

—or—

Click **Search** for all the PA Server available on the network.





### **Note**

- When the software cannot connect to the PA Server, the following error message will appear.



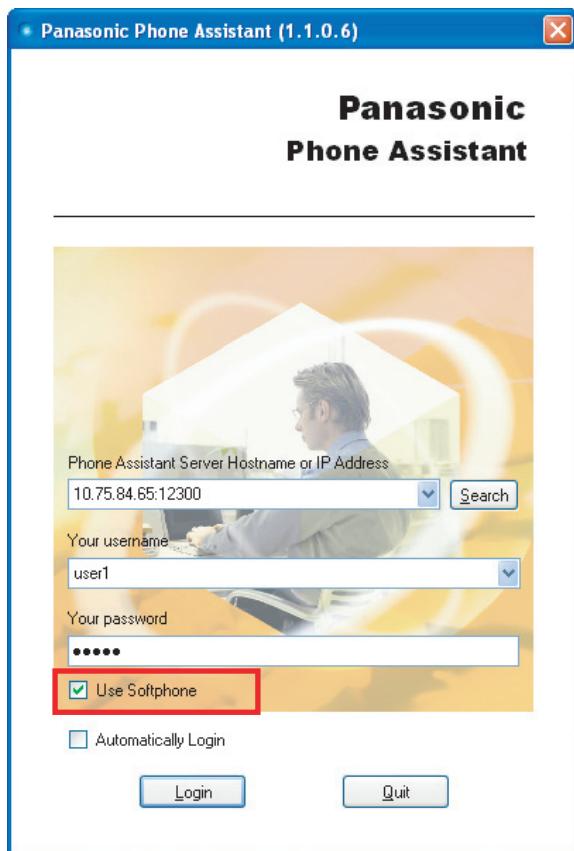
This error screen also appears when the **Phone Assistant Server Hostname or IP Address** field is either empty or incorrect.

#### **What to do:**

Click **OK** to continue, check your server IP address and attempt to connect to the server again. In some cases, it is recommended to use the **Search** button to refresh the PA Server list.

3. Enter your user name in the **Your username** field.
4. Enter your password in the **Your password** field.

5. Select the **Use Softphone** check box.



### Note

If the Softphone has not been configured, the configuration screen will appear.



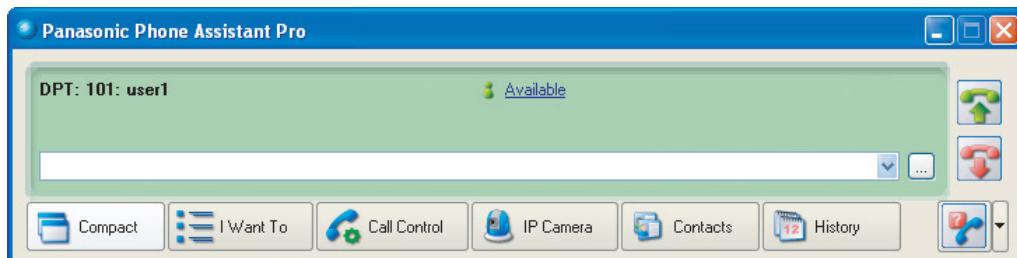
Enter the **PBX IP Address** and **Local IP Address**, and click **OK**.

**Note**

- When the **Automatically Login** option is checked, you can log in to PA without manually entering your user name and password every time.

**6. Click Login.**

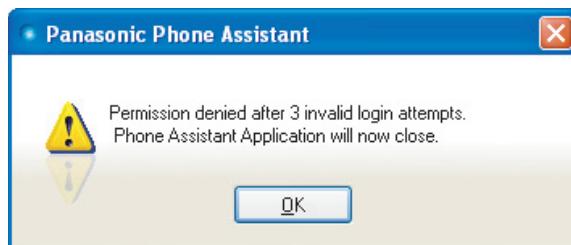
After you have successfully logged in to the application, the PA Information Panel will appear in **Compact** mode.



If PA Server is activated, all the usual call control functions will be available. If PA Server is not activated, you can only make and receive calls using the **Answer or Dial** and **Hang Up** buttons. Please refer to 4.1 Answer or Dial Button and 4.2 Hang Up Button for details.

**Note**

- If you cannot successfully log in after 3 attempts, the following error message will appear.

**What to do:**

Click **OK**, and PA will exit. Launch PA and try logging in again.

To exit the application:

- Click the close button.



A dialog box asking you to confirm the operation will appear.

- Click **Yes**.



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